PowerSchool Administrator User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Preface

Use this guide to assist you while navigating the PowerSchool Student and Parent portal. This guide is based on the PowerSchool Student and Parent portal online help, which you can also use to learn the PowerSchool Student Information System (SIS) and to serve as a reference.

The PowerSchool Student and Parent portal online help is updated as PowerSchool is updated. Not all versions of the PowerSchool Student and Parent portal online help are available in a printable guide. For the most up-to-date information, click **Help** on any page in the PowerSchool Student and Parent portal.

Referenced Sections

This guide is based on the PowerSchool Student and Parent portal online help, and may include references to sections that are not contained within the guide. See the PowerSchool Student and Parent portal online help for the referenced section.

Security Permissions

Depending on your security permissions, only certain procedures may be available to you.

Navigation

This guide uses the > symbol to move down a menu path. If instructed to "Click **File > New > Window**," begin by clicking **File** on the menu bar. Then, click **New** and **Window**. The option noted after the > symbol will always be on the menu that results from your previous selection.

Notes

It is easy to identify notes because they are prefaced by the text "**Note:**."

Address Management User Guide

PowerSchool

Student Information System

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

With the introduction of Address Management, PowerSchool now provides a tool for address validation and boundary management. Address Management improves efficiency and accuracy in managing your address data, using cutting edge technology through visual representation of the address and boundary.

Address Validation

Address validation is the process by which an address is authenticated by an external address validation service, Google Maps. Google Maps determines if the address is valid based on whether the address can be found in its mapping database and if the address is of address level accuracy, one to which mail can be delivered, with the exception of post office boxes. If an address is valid, a geocode is associated with the address, and recorded in the student's database record. If the address is not valid, the areas of uncertainty associated with it and/or alternate addresses are identified.

Address validation can be performed for a selection of students or interactively for an individual student. Performing address validation for an individual student can be done using the student's Addresses page or the General Demographics page, as well as during the enroll a new student process.

Boundary Validation

Boundary validation is the process by which an address is identified as being inside or outside a given boundary. Boundaries are defined by the PowerSchool administrator for districts of residence and schools and stored in the PowerSchool database.

Boundary validation can be performed for a selection of students or interactively for an individual student. Performing boundary validation for an individual student can be done when performing the address validation process using the student's Addresses page or the General Demographics page, as well as during the enroll a new student process. The relationship of a student's address geocode to defined boundaries is indicated as "in" bounds or "out" of bounds on the interactive Address Validation page.

Quick Start

To get started immediately, perform the following tasks to set up and begin using Address Management:

- Enable Address Management

- Set Page-Level Permissions
- Define District Boundaries
- Define School Boundaries
- Import Records
- Perform Batch Address Validation
- Perform Interactive Address Validation
- Perform Batch Boundary Validation

Administration

Enable Address Management

By default, Address Management is disabled. PowerSchool provides the initial key and server needed to render Address Management operational. You can either use PowerSchool's free geocoding proxy server, which shares a rate limit between all customers, or you can purchase an enterprise key from Google, which processes up to 10 requests per second dedicated to your site. For more information, visit Google at http://code.google.com/apis/maps/signup.html. Once Address Management is enabled, Address Management functionality appears throughout PowerSchool.

Note: To disable Address Management, see *Disable Address Management*.

How to Enable Address Management

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **3rd Party Configuration**. The 3rd Party Configuration page appears.
3. Use the following table to enter information in the fields:

Field	Description
Geocoding Adapter	Choose one of the following from the pop-up menu: • **Disabled** to disable batch validation. This is the default setting. • **Google Maps - Requires ID** to enable batch validation using your Google Maps Enterprise Client ID. • **Geocoding via PowerSchool Proxy** to enable batch validation using PowerSchool's free Google Maps enterprise ID.
Google Maps Client ID	If you chose **Google Maps - Requires ID** as your **Geocoding Adapter**, enter your own Client ID. **Note:** If you chose **Geocoding via PowerSchool Proxy** as your **Geocoding Adapter**, this field is not applicable.

Google Maps Private Key	If you chose **Google Maps - Requires ID** as your **Geocoding Adapter**, enter the secret key you received from Google with your Client ID. **Note:** If you chose **Geocoding via PowerSchool Proxy** as your **Geocoding Adapter**, this field is not applicable.
PowerSchool Proxy URL	If you chose **Geocoding via PowerSchool Proxy** as your **Geocoding Adapter**, this field should be set to **https://gp.powerschool.com/powerschool-proxy-service/services/AddressValidatorProxyService?wsdl**. **Note:** If you chose **Google Maps – Requires Key** as your **Geocoding Adapter**, this field is not applicable.
Mapping Adapter	Choose one of the following from the pop-up menu: • **Disabled** to disable interactive map validation. This is the default setting. • **Google Maps** to enable interactive map validation.
Google Maps URL	If you chose **Google Maps** as your **Mapping Adapter,** this field should be set to **https://gp.powerschool.com/cgi-bin/googleMapsJSAPI_Proxy.cgi?version=3**. However, you may provide your own server by entering your server information. **Note:** If you chose **Disabled** as your **Mapping Adapter**, this field is not applicable.

4. Click **Submit**. The Districts Setup page displays.

Set Page-Level Permissions

To ensure that only the staff whose job duties include Address Management can make changes to the Address Management pages, you can define which staff members can access those pages by setting permissions as the page level. For more information about setting page-level permissions, see *Security Permissions*.

Define District Boundaries

Once Address Management is enabled, you can then define the geographical boundary for districts of residence. The geographical boundary is captured within a single encoded polyline. The encoded polyline is made up of sets of latitude/longitude pairs marking the boundary. The sets of latitude/longitude pairs are also known as points.

How to Create District Boundaries

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Districts of Residence**. The Districts of Residence page appears.
3. Click **New** to create a new district of residence. The New District of Residence page appears.
4. Enter **District ID**, **District Name**, and **Sort Order** information as needed. For detailed information, see *District of Residence*.
5. Do one of the following:
    - If you have an encoded polyline from another system, you can enter it in the **Edit Boundary** text box and proceed to Step 8.
    - If you do not have an encoded polyline from another system, click **Edit Boundary**. The Boundary Definition pop-up window appears.
6. Use the following table to edit information in the fields:

Field	Description
Generate Boundary For	The name of the selected district or school.
Search	Identify the center of the boundary. Enter the address of the district or school and click **Search**. The map refreshes centered on the address.
Latitude	The latitude coordinates for each point on the map and in the Point List appear when selected.
Longitude	The longitude coordinates for each point on the map and in the Point List appear when selected.

Point List	For each point you add to the list, the latitude, longitude, and map level appears.
Add Point	Click on the map to place the point. You may drag the marker to adjust the location of the point. Once you are satisfied with the location of the marker, click to add as a point to the **Point List**. Repeat for each point of your boundary. **Note:** For basic map navigation controls, see *[Interactive Map]*.
Delete Selected Point	Select a point from the **Point List** and then click to delete the point.
Delete All Points	Click to delete all points from the **Point List**.
[Interactive Map]	Basic navigation controls include: • Click on the map to place a point on the map. • Click a point from the **Point List** to highlight it on the map. • Click and drag the map. • Click the appropriate arrow to move the view north, south, east or west. • Double-click to zoom in on the map. • Click **+** to zoom in on the center of the map. • Click **–** to zoom out. • Click **Map** to view street-level imagery. • Click **Sat** to view satellite imagery. • Click **Hyb** to view a combination of street-level and satellite imagery. **Note:** For additional information, see *Google Maps User Guide* at http://maps.google.com/support/.

7. Click **Accept** to accept the defined district boundary. The Boundary Definition pop-up window closes, and the encoded polyline appears in the **Edit Boundary** text box.

   Note: Click **Cancel** to discard any changes.

8. Click **Submit**. The Districts of Residence page displays the new or updated district of residence.

How to Edit District Boundaries

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Districts of Residence**. The Districts of Residence page appears.
3. Click the district of residence you want to edit. The Edit District of Residence page appears.
4. Enter **District ID**, **District Name**, and **Sort Order** information as needed. For detailed information, see *District of Residence*.
5. Do one of the following:
    - If you have an encoded polyline from another system, you can enter it in the **Edit Boundary** text box and proceed to Step 8.
    - If you do not have an encoded polyline from another system, click **Edit Boundary**. The Boundary Definition pop-up window appears.
6. Edit the information as needed. For field descriptions, see *How to Create District Boundaries*.
7. Click **Accept** to accept the defined district boundary. The Boundary Definition pop-up window closes, and the encoded polyline appears in the **Edit Boundary** text box.

   Note: Click **Cancel** to discard any changes.

8. Click **Submit**. The Districts of Residence page displays the new or updated district of residence.

Define School Boundaries

Once you have defined the geographical boundary for your district, you can then define the geographical boundary for each of the schools within your district.

How to Define School Boundaries

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Boundary**. The School Boundary Definition page appears.
3. Click **Edit Boundary**. The Boundary Definition pop-up window appears.
4. Use the table in *How to Define District Boundaries* to enter information in the fields.

5. Click **Accept** to accept the defined school boundary. The Boundary Definition pop-up window closes.

   Note: Click **Cancel** to discard any changes.

6. Click **Submit**. The Changes Recorded page appears.

Import and Export Records

To transfer Address Management data into and out of PowerSchool, you can use one of the many PowerSchool importing and exporting tools. For detailed information about importing and exporting records, see *Import and Export*.

How to Import Address Management Data

When importing data, you need to create an ASCII text file, preferably tab delimited. Do not use a colon or comma as the field delimiter. The import spreadsheet must include the following required fields: **Student_Number**, **First_Name**, **Last_Name**, **Geocode**, and/or **Mailing_Geocode**. The following format must be used when entering geocode information: Lat: [coordinate], Lng: [coordinate]. For example, Lat: 41.3800231, Lng: -111.0229216.

How to Export Address Management Data

When exporting data, enter the following required fields to be included on the exported spreadsheet: **Student_Number**, **First_Name**, **Last_Name**, **Geocode**, and/or **Mailing_Geocode**. Do not use a colon or comma as the **Field Delimiter**. Preferably, use a tab to separate each field in the export file.

Search for Students

To search for students based on geocode, you can use the **Search Students** function on the PowerSchool start page. Depending on the expression you enter, you can search for students with a geocode, students without a geocode, or a subset of either. The following table provides examples of search expressions using geocode. You may also use mailing_geocode. For more information, see *Student Search*.

How to Search for Students Using Geocode

1. On the start page, enter one of the following command syntaxes in the **Search Students** field:

Field	Description
geocode#“”	All students where a value appears in **Geocode** field.
grade_level=9;geocode#“”	All ninth-grade students where a value appears in **Geocode** field.
grade_level=10;geocode#“”	All tenth-grade students where a value appears in **Geocode** field.
grade_level=11;geocode#“"	All eleventh-grade students where a value appears in **Geocode** field.
grade_level=12;geocode#“”	All twelfth-grade students where a value appears in **Geocode** field.
geocode=“”	All students where a value does not appear in **Geocode** field.
grade_level=9;geocode=“”	All ninth-grade students where a value does not appear in **Geocode** field.
grade_level=10;geocode=“”	All tenth-grade students where a value does not appear in **Geocode** field.
grade_level=11;geocode=“”	All eleventh-grade students where a value does not appear in **Geocode** field.
grade_level=12;geocode=“”	All twelfth-grade students where a value does not appear in **Geocode** field.

2. Click the **Search** icon. A list of all students matching the search criteria you entered appears in the Current Student Selection section.
3. Do one of the following:
    - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.

- To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about the Group Functions page, see *Work with Groups*.

Report Map Errors

Google Maps gets its map data from TeleAtlas. While TeleAtlas works with over 50,000 reliable resource world-wide to make over 10,000 map improvement updates each day, it's possible that you may find an error in the map data. To report a map error, visit Google's Fix an error on Google Maps page.

How to Report Map Errors

1. Open your Web browser.
2. Enter www.google.com and press RETURN (Mac) or ENTER (Windows). The Google home page appears.
3. Click **Maps** > **Help** > **Fix an error on Google Maps**. The Fix an error on Google Maps page appears.

   Note: To access the Fix an error on Google Maps page, you can also simply click http://maps.google.com/support/bin/answer.py?hl=en&answer=98014.

4. Click the link to the error that best describes the issue you are experiencing.
5. Follow instructions provided by Google.

Disable Address Management

Once you have enabled Address Management, later you may find it necessary to render it inoperative. If Address Management is disabled, certain Address Management functionality no longer appears throughout PowerSchool.

Note: To enable Address Management, see *Enable Address Management*.

How to Disable Address Management

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **3rd Party Configuration**. The 3rd Party Configuration page appears.
3. Use the following table to enter information in the fields:

Field	Description
Geocoding Adapter	To disable batch validation, choose **Disabled** from the pop-up menu.
Mapping Adapter	To disable interactive map validation, choose **Disabled** from the pop-up menu.

4. Click **Submit**. The Districts Setup page displays.

Validation

Perform Batch Address Validation

The batch address validation process provides you with the ability to validate and update address information for multiple students all at one time.

The batch address validation process may be used to validate either the primary address or the mailing address of the selected students. When validating primary addresses, a geocode is generated and associated to the student's primary address. When validating mailing addresses, a geocode is generated and associated to the student's mailing address.

When performing the batch address validation process, a street, city, state, and zip code may be automatically updated if there is only one matching address that is of address level accuracy. If there is not an address meeting these criteria, a validation exception occurs, and the address appears as an exception, providing you the opportunity to reconcile the discrepancy.

Note: This process may take several minutes to complete (or longer) depending on the selection size and your connection speed to the Internet.

How to Perform Batch Address Validation

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Validation, choose **Batch Address Validation**. The Batch Address Validation page appears.
4. Use the following table to enter information in the fields:

Field	Description
Validate which students	Indicate which students you want to validate addresses for by choosing one of the following from the pop-up menu: • Choose **All Students** to perform the validation process for all students in the current school.

	• Choose **Current Selection** to perform the validation process for the selected set of students in the current school. **Note:** For performance reasons, it is recommended that you perform the validation process for a selected set of students rather than for all students.
Validate which addresses	Indicate which addresses you want to validate by choosing one of the following from the pop-up menu: • Choose **Addresses without geocodes** to perform the validation process for only those addresses that have not been previously validated and do not have a geocode. **Note:** For performance reasons, it is recommended that you perform the validation process for addresses that do not have geocodes rather than for all addresses.
Which address types	Indicate which address type you want to validate by choosing one of the following from the pop-up menu: • Choose **Primary** to perform the process for students' home address. • Choose **Mailing** to perform the process for students' mailing address.
Update Street, City, State, Zip	Select the checkbox to automatically update the street, city, state, and zip code of each address with the street, city, state, and zip code information provided by the validation process, if only one address is returned by the validation service and that address is of address level accuracy. Alternatively, leave the checkbox blank if you do not want to automatically update the street, city, state, and zip code of each address with the street, city, state, and zip code information provided by the validation process. **Note:** This checkbox is applicable only when one address of address level accuracy exists.

5. Click **Submit**. The Batch Address Validation Results page displays a summary of the processed records and any validation exceptions, including the student's name, address, and error message. Possible error messages include:
    - Unknown location. Cannot find address.
    - Country level accuracy. Cannot find state.
    - State/Province level accuracy. Cannot find city.
    - County level accuracy. Cannot find street.
    - City level accuracy. Cannot find street.
    - Postal code level accuracy. Cannot find street.
    - Partial street level accuracy. Cannot find street number.
    - Intersection level accuracy. Cannot find street number.
    - Premise level accuracy. Invalid address.

        Note: Premise level accuracy appears when only the name of a building or type of building, such as airport, can be found.

6. If an exception appears, click the **Name** of the student to view the student's General Demographics page where you can then reconcile the discrepancy.

Perform Interactive Address Validation

Interactive address validation allows you to view a student's home address or mailing address on a map, providing visual confirmation of the location. If more than one address is returned by the service, such as if the city or state fields were omitted, you are provided the opportunity to choose the correct one from a list of alternatives.

Note: Interactive address validation can also be performed when enrolling a new student. For detailed information, see *Enroll New Student*.

How to Perform Interactive Address Validation

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Do one of the following:
    - Under Information, choose **Addresses** from the student pages menu. The Addresses page appears.
    - Under Information, choose **Demographics** from the student pages menu. The General Demographics page appears.
3. Use the following table to enter Home Address information:

Field	Description
Street, Apt/Suite	Enter the street address in the first field, and apartment or suite number in the second field, if any.
City, State, Zip	Enter the city, state, and zip code for the street address.
Geocode	The latitude/longitude pair that represents the geographical location of the home address. This field is read-only and is automatically generated when the address is validated or imported.

4. Use the following table to enter Mailing Address information:

Field	Description
Copy From Home Address	If a student's mailing address is the same as their home address, click to duplicate the home address information in to the mailing address fields.
Street, Apt/Suite	Enter the street address in the first field, and apartment or suite number in the second field, if any.
City, State, Zip	Enter the city, state, and zip code for the street address.
Geocode	The latitude/longitude pair that represents the geographical location of the mailing address. This field is read-only and is automatically generated when the address is validated or imported.

5. Click **Validate** next to the address for which you want to perform address validation. The Address Validation pop-up window appears.
6. Use the following table to enter Address Validation information:

Field	Description

View Boundary	Indicate which boundary you want to view on the interactive map by choosing one of the following from the pop-up menu: • Choose **None Selected** if you do not want to view boundaries. By default, the pop-up menu is set this value. • Choose **Current School** to view the student's current school's boundaries. • Choose **Next School** to view the student's next school's boundaries. • Choose a district or school to view that district or school's boundaries. **Note:** This pop-up menu only appears when validating home addresses. Boundaries in the list appear prefixed by "in" bounds or "out" of bounds and may appear color-coded. Green indicates the address is inside the boundary. Red indicates the address is outside the boundary. Only districts or schools with defined boundaries appear in the pop-up menu. For more information, see *Define School Boundaries*.
Student Info	The student's **Name**, **Address Type**, **Selected Address** and **Geocode**, if any, appear. Before clicking **Accept**, you must select a valid address. This can either be the original address, if valid, or an alternative address. **Note:** Click **Cancel** to discard any changes and close the Address Validation pop-up window.
Original Address	The student's original address information appears.
Alternative Address	Determine which alternative address is the best match to the student's original address. You can use the interactive map to assist you in making that decision. Once you have determined which alternative address is the best match to the student's original address, do one of the following: • Select the **Full Update** option to update the address that appears in the Student Info section to this address, including street address, city, state, zip, and geocode.

	• Select the **Partial Update** option to only update the city, state, zip, and geocode of the address that appears in the Student Info section. **Note:** This option is useful if your school's policy includes standards for address components, such as use "Avenue" in lieu of "Ave."
[Interactive Map]	Use the interactive map to assist you determining which alternative address you want to select. The selected address appears as a marker on the map displaying address and geocode information. Basic navigation controls include: • Click the marker to view the Info window. • Click the map to close the Info window. • Click and drag the map. • Click the appropriate arrow to move the view north, south, east or west. • Click **+** to zoom in on the center of the map. • Click **–** to zoom out. • Click **Map** to view street-level imagery. • Click **Sat** to view satellite imagery. • Click **Hyb** to view a combination of street-level and satellite imagery. **Note:** For additional information, see *Google Maps User Guide* at http://maps.google.com/support/.

7. Once you have identified and selected the student address you want, click **Accept** to accept the address. Depending on which student page you were initially on, either the Addresses or General Demographics page appears.

   Note: Click **Cancel** to discard any changes.

8. Note the address information you selected now appears in the respective fields.
9. Click **Submit**. The Changes Recorded page appears.

Perform Batch Boundary Validation

The batch boundary validation process provides you with the ability to establish a set of students who fall within or outside of a given boundary. Once a set of students is identified, you can then perform a number of group functions with those students, such as setting the next school indicator or printing reports or form letters for a group of selected students..

Note: Boundary validation is based on a student's home, or primary, address.

How to Perform Batch Boundary Validation

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Validation, choose **Batch Boundary Validation**. The Batch Boundary Validation page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Check boundary membership for which student	Indicate which students you want to validate boundaries for by choosing one of the following from the pop-up menu: • Choose **All Students** to perform the validation process for all students in the current school. • Choose **Current Selection** to perform the validation process for the selected set of students in the current school. **Note:** For performance reasons, it is recommended that you perform the validation process for a selected set of students rather than for all students.
Use which boundary	Choose the district or school from the pop-up menu for which you want to perform the boundary validation process.

	Note: Only districts or schools with defined boundaries appear in the pop-up menu.
Select students who are	Indicate which students you want the validation process to return as an updated selection by choosing one of the following from the pop-up menu: • Choose **Within the selected boundary** to return students who live within the boundary. • Choose **Outside the selected boundary** to include students who live outside of the boundary.

5. Click **Submit**. The Batch Boundary Validation Results page appears. The **View Current Selection** link appears indicating the number of students found within or outside the selected boundary.
6. To work with the group of students, click **View Current Selection**. The Student Selection page appears.

Definition of Terms

The following terms are used in reference to Address Management:

Address Level Accuracy

An address to which mail can be delivered, with the exception of post office boxes.

Boundary

A defined area on a map.

Encoded Polyline

A series of character codes identifying the sets of latitude/longitude pairs marking a boundary.

Geocode

The latitude/longitude pair that represents the geographical location of an address.

Home Address

The place where a student actually lives. Also known as primary address.

Mailing Address

The place where a student receives mail.

Marker

Object on the map that represents a point.

Point

Set of latitude/longitude pair on the map noted by marker.

Polylines

A collection of points.

Primary Address

The place where a student actually lives. Also known as home address.

Analytics User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool includes a close integration with Analytics. Analytics provides substantial analytic tools for evaluating test scores and other data.

Using the search power of PowerSchool, users can now select students, sections, courses, schools, teachers or the entire district, and view the Analytics District Dashboard and Student Profile views within PowerSchool.

Analytics Server Settings

There are several settings that must be in place on the Analytics server to have a successful Analytics integration with PowerSchool. The following section provides details on these settings.

Set Up District Dashboard and Student Profile Templates

On the Analytics server, make sure you have set up the District Dashboard and Student Profile templates. These templates display the Analytics data inside the PowerSchool application.

Add Vendors on the Analytics Server

You must add a vendor on the Analytics server to view Analytics data in PowerSchool. The information you enter on the Edit Vendor page is used to populate fields on the Analytics Settings page in PowerSchool.

The Vendor Name, Username, and password provided in this procedure are used as examples. You may enter a value of your choice in each of these fields.

How to Add a Vendor on the Analytics Server

1. Sign in to the Analytics Server.
2. Click **Setup & Maintenance**. The Setup & Maintenance menu appears.
3. Select **Other Maintenance**. The Other Maintenance menu appears.
4. Select **Vendor**. The Vendor List appears.
5. Click **Add Vendor**. The Edit Vendor page appears.
6. Use the following table to enter information in the fields:

Field	Description
Vendor Name	Enter **powerschool**.
Username	Enter **powerschool**.
Password	Enter a password.

7. Click **Save**.

Add Users on the Analytics Server

Create a user name on the Analytics server to allow access to Analytics data through the PowerSchool application.

How to Add a User on the Analytics Server

1. On the Analytics server, click **Setup & Maintenance**. The Setup & Maintenance menu appears.
2. Select **Other Maintenance**. The Other Maintenance menu appears.
3. Select **Users**. The User List appears.
4. Choose **District Office** from the **Choose a Building** pop-up menu.
5. Click **Add User**. The Add User page appears.
6. Use the following table to enter information in the fields:

Field	**Description**
Internal Key	Enter a value. This value will be entered in the **User Name** field on the Analytics Settings page in the PowerSchool application.
Username	Enter the same value you entered in the **Internal Key** field.
Password	Enter a password. **Note**: This field is required but is not currently used to authenticate with the PowerSchool server.
Confirm Password	Re-enter the password. **Note**: This field is required but is not currently used to authenticate with the PowerSchool server.
Email	Enter the user's email address. **Note**: This field is required but is not currently used to authenticate with the PowerSchool server.
Role	Choose the appropriate role from the pop-up menu.

User Security Group	Choose the appropriate user security group from the pop-up menu.

7. Click **Save**.

Analytics Settings in PowerSchool

Once you have completed adding a vendor and user on the Analytics server, you must add the information in PowerSchool to allow for single sign on access.

When creating user accounts, you can select from the following two types:

- Synchronized accounts allow you to ensure that the exact permissions of an administrator or teacher in PowerSchool match the exact permissions of that same user in Analytics. When the user loads Analytics, they will be restricted to exactly the permissions given their specific account. This ability allows you to give specific administrators or teachers more access to Analytics, while limiting access to other users. The Synchronized Accounts model is the preferred method as it has more fine-tuned permission roles.
- Shared generic accounts (Shared Authentication) allow you to set up one-to-three generic users in Analytics and assign permissions according to the type of user. This is an alternative to the synchronized accounts model. Normally, there will be a generic admin Analytics user, a generic teacher user, and a generic parent user. Permissions will be set in Analytics separately for each type of user.

Additionally, it is important to note:

- **Teacher Role:** When creating a new teacher in PowerSchool, even though you may not specify a security group, the security group defaults to “Unassigned Group 1”. In order for teachers to be able to access Analytics, Analytics will need to be enabled for this security group.

  Note: If you are already using “Unassigned Group 1”, it is recommended to create a new group and reassign users currently belonging to this group to the new group and reserve the “Unassigned Group 1” to assign Analytic access for teachers.

- **Teacher and Admin Role:** If a teacher also serves as an admin, typically a specific security group is assigned to accommodate this dual role. In order for teachers to be able to access Analytics, Analytics will need to be enabled for this security group.

Enable Analytics

You must enable Analytics to be able to view the Analytics Dashboard in PowerSchool and the PowerSchool Student and Parent portal. Once enabled, you can manage the data libraries in PowerSchool.

How to Enable Analytics

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Choose **Analytics Settings**. The Analytics Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Analytics Enabled	Select the checkbox to enable Analytics.
Domain or Host IP	Enter the domain or host IP of the Analytics application server, provided by Analytics, such as **https://prod1.analytics.com**. **Note:** Changing this setting does not require a restart of PowerSchool. However, you may still be required to clear your browser cookies before the update takes effect.
Dataset Name	Enter the dataset (Analytics instance name) provided by Analytics. The Dataset Name is the same value that you enter after the IP address when you sign in to your Analytics Server, such as **https://prod2.analytics.com/signin/demo-applegrove**. In this example, the Dataset Name would be "demo-applegrove."
Vendor Name	Enter the vendor name you created on the Analytics server. For more information, see *How to Add a Vendor on the Analytics Server*.
Vendor Password	Enter the vendor password you created on the Analytics server. For more information, see *How to Add a Vendor on the Analytics Server*.
Teacher/Admin Authentication Mode	Do one of the following: • Choose **Synchronized Accounts** from the pop-up menu. The **Guardians Shared Analytics User** field appears. **Note**: Synchronized account authentication requires that the same user accounts exist in both PowerSchool and Analytics. When using the Analytics data loader, teacher accounts from

	PowerSchool are automatically created and updated in Analytics for all teachers identified in the class roster data that's extracted from PowerSchool. Admin accounts can also be automatically created and updated in Analytics for each user included in a USER file that may optionally be included as part of the Analytics data load process. If a USER file is not provided, the admin accounts will need to be created manually in Analytics to enable single sign-on access from PowerSchool. For synchronized authentication to work for any PowerSchool user, the corresponding user account in Analytics must have the correct value in the **Internal Key** field. When using the data loader, this field is populated automatically for all users identified (i.e. teachers identified in class roster data and other users provided in the USER file). SIF will populate this field for all teacher accounts. **Note on the Analytics Internal Key**: The Analytics Internal key should match the system defined **Teacher ID** field in PowerSchool not the Teacher_Number, which is accessed via DDE. This is the key that allows the synchronized accounts to work successfully. If the admin accounts in Analytics do not have the **Internal Key** field, then this must be populated for this synchronized setting to work for administrators. • Choose **Shared Authentication** from the pop-up menu. The **Admin Shared Analytics User**, **Teacher Shared Analytics User**, and **Guardians Shared Analytics User** fields appear. • Enter the value from the **Internal Key** field on the Analytics server. For more information, see *How to Add a User on the Analytics Server*. **Note**: Ensure that Analytics has one-to-three generic users set up. Ideally, there is one for each Admin, Teacher, and Parent. If using the same shared account for all three types of users, parents

	will always be restricted to just the student they have access to, with no ability to navigate.
Enable Analytics in the Following Locations	Select the applicable checkbox to add Analytics in the following areas: **Note**: All check boxes are selected by default, except for Student Analysis (Parent Portal), which is deselected by default. • **Overall District Management** - Select to allow access to Analytics Management dashboard. • **District Dashboard** - Select to allow district access to the Analytics dashboard on the PowerSchool Dashboard page. For more information, see *Dashboard*. • **School Dashboard** - Select to allow school access to the Analytics dashboard on the PowerSchool Dashboard page. For more information, see *Dashboard*. • **Course Analysis** - Select to allow access to Analytics Course view on the Courses page. For more information, see *How to View the Course List*. • **Section Analysis** - Select to allow access to Analytics Section view on the Section page. For more information, see *How to View Course Sections*. • **Teacher Analysis** - Select to allow access to Analytics Teacher View on the Staff page. For more information, see *How to View Analytics Teacher Data*. • **Student Analysis (Admin Portal)** - Select to allow access to Analytics Student Sandbox on the Student Quick Lookup page. For more information, see *Student Page Layout*. • **Student/Section Analysis (Teacher Portal)** - Select to allow access to Analytics on the Start page and Student Quick Lookup page in the PowerTeacher portal. For more information, see *PowerTeacher Start Page* and *PowerTeacher Student Information* in the PowerTeacher online help. • **Student Analysis (Parent Portal)** - Select to allow access to Analytics on the Grades and Attendance page in the PowerSchool Student and Parent portal. For more information, see *Grades and Attendance* in the PowerSchool Student and Parent portal online help.

5. Click **Submit**. The Analytics Settings page appears.

Enable Analytics User Access

In order to allow access to Analytics, you must set the user group security permissions. Modify the related users group security permissions to allow access to Analytics.

Note: For more information, see *Group Security Permissions*.

How to Enable Analytics User Access

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.
3. Click a name in the **Group Name** column. The Edit Group page appears.
4. Select the **Analytics Access** checkbox.

   Note: This field only displays if Analytics is enabled. For more information, see *Enable Analytics*.

5. Click **Submit**.

Manage Analytics Data Libraries

If Analytics is enabled, you can manage the data libraries via PowerSchool.

How to Manage Analytics Data Libraries

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Click **Analytics Management**. The Analytics Management page appears.

   Note: The data that appears on the page is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

Disable Analytics

Once you have enabled Analytics, later you may find it necessary to render it inoperative.

Note: To enable Analytics, see *Enable Analytics*.

How to Disable Analytics

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Click **Analytics Settings**. The Analytics Settings page appears.
4. Deselect the **Analytics Enabled** checkbox.
5. Click **Submit**. The Analytics Settings page appears.

View Analytics Data

Once enabled, Analytics data appears throughout PowerSchool, the PowerSchool Student and Parent portal, and PowerTeacher. For more information, see *Enable Analytics*.

Note: The data that appears is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

View Analytics Data via the Dashboard

Use this procedure to view Analytics data in PowerSchool via the Dashboard.

How to View Analytics Data via the Dashboard

1. Sign in to PowerSchool.
2. On the start page, choose **Dashboard** under Functions in the main menu. The Dashboard page appears.
3. Click the **Analytics** tab to view Analytics data.

   Note: For more information, see *Dashboard*.

View Analytics Course Data

Use this procedure to view Analytics course data in PowerSchool.

How to View Analytics Course Data

1. Sign in to PowerSchool.
2. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
3. Under Courses, click **Courses**. The Courses page displays.
4. Click the **Analytics** icon to view Analytics data.

   Note: For more information, see *Manage Courses*.

View Analytics Section Data

Use this procedure to view Analytics section data in PowerSchool.

How to View Analytics Section Data

1. Sign in to PowerSchool.
2. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
3. Under Scheduling, click **Sections**. The Sections page appears.
4. Choose the course name from the courses menu. The course information page lists the course sections.
5. To work with the group of students in all of the sections of the selected course, click **Make all students listed above the current selection**. The Group Functions page appears. For more information, see *Work with Groups*.
6. Click the **Analytics icon** to view Analytics data.

View Analytics Teacher Data

Use this procedure to view Analytics teacher data in PowerSchool.

How to View Analytics Teacher Data

1. Sign in to PowerSchool.
2. On the start page, search for and select a staff member. For more information, see Staff Search.
3. Click **Analytics Teacher View**. The Analytics Teacher View page appears.

   Note: You can also access the Analytics Teacher View from the Teacher Schedule page. For more information, see *Staff Current Schedule*.

   Note: For more information see *Analytics Teacher View*.

View Analytics Student Data

Use this procedure to view Analytics student data in PowerSchool.

How to View Analytics Student Data

1. Sign in to PowerSchool.
2. On the start page, click the **Analytics** icon to view Analytics student data.

   Note: For more information see *Analytics Student View*.

View Analytics Student Data via the PowerSchool Student and Parent Portal

Use this procedure to view Analytics student data in the PowerSchool Student and Parent portal.

How to View Analytics Student Data via the PowerSchool Student and Parent Portal

1. Sign in to the PowerSchool Student and Parent portal.
2. On the start page, click **Grades and Attendance** from the navigation menu. The Grades and Attendance page appears.
3. Click the **Analytics Student View** tab. The Analytics Student View page appears.

View Analytics Student Data via PowerTeacher

Use this procedure to view Analytics student data in the PowerTeacher.

How to View Analytics Student Data via PowerTeacher

1. Sign in to the PowerTeacher portal.
2. Do one of the following:
    - On the start page, click the **Analytics** icon to view Analytics student data.
    - On the Student Information page, click the **Analytics Student View** tab to view Analytics Student data.

Attendance Tracking and Notification User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Attendance Tracking and Notification can be used in combination with the basic PowerSchool attendance setup. The additional setup elements allow for tracking of truant attendance using a combination of thresholds and triggers. Each time a student meets or exceeds a specific threshold, a notification record is created in the PowerSchool database. The notification records can be used to print attendance letters for students with truant attendance.

For example, you may set up your school to track unexcused absences. Using basic PowerSchool attendance, you can report the total number of unexcused absences for a student for particular period of time. Using attendance tracking, you can report when the student reaches a defined number of unexcused absences (thresholds) for multiple instances (triggers). In this example, you may track the first time the student reaches five unexcused absences, as well as the second time (ten absences) and third time (fifteen absences).

Remote Attendance

All calculations for Attendance Tracking and Notification will consider attendance for classes taken at a remote school. Rules regarding remote attendance:

- Both schools must record attendance in either Meeting-Period-To-Day (MPTD) or Meeting-Time-To-Day (MTTD).
- Both schools must be set up to use ATN.
- All calculations are based on the attendance settings defined at the students ‘home’ school regardless of the settings defined at the remote school.

For example, school A is the student’s ‘home’ school, and is ATN is configured to use Meeting – Period to Day (MPTD). All calculations for this student would be based on the attendance conversion set up for Period attendance at School A.

State Reporting

For state-specific information, see PowerSchool's recommended state-specific setup of Attendance Tracking and Notification settings available on PowerSource in your state reporting setup guide. If there is no state-specific setup specified in your state reporting setup guide, there is no state-specific setup considerations need to be taken into account.

Basic Attendance Setup

Attendance Tracking and Notification requires that PowerSchool attendance is set up to accurately calculate attendance and membership.

The attendance setup elements that directly affect Attendance Tracking and Notification are:

- Attendance code categories
- Attendance codes

Attendance Code Categories

Attendance code categories are used to identify types of attendance. The attendance codes associated to a particular category must either be absent codes or present codes. For example, you must set up an attendance code category to track unexcused absences, and all of the codes assigned to the category must be absent codes. The default Unexcused category set up in PowerSchool is designed to track unexcused absences and can be used for attendance tracking and notification. Alternatively, if you want to track unexcused absences separately for different reports, then you must set up two unexcused absence categories, one for attendance tracking and notification and one for other purposes.

If you want to track unexcused tardies in attendance tracking and notification, you must set up an unexcused tardy attendance code category. Note that tardies are considered present, thus all codes assigned to the Tardy attendance code category must be present codes. In order to track both unexcused tardies and unexcused absences, you must have a separate attendance code category for each.

Once attendance code categories are set up, these code categories must be associated to the appropriate attendance codes and attendance tracking category, in order to properly track attendance.

For information about associating attendance code categories with attendance tracking categories, see *Unexcused Tracking Categories* or *Illness Tracking Categories*.

For more information about attendance code categories, see *Attendance Code Categories* or the *Attendance User Guide* available on PowerSource.

Attendance Codes

Attendance codes are used to assign an attendance to a student for a particular day, section meeting, or interval. For example, you may set up attendance codes such as Unexcused Absence (UE) and Illness Absence (IL).

Once attendance codes are set up, these codes must be associated with the appropriate attendance code category. If you track both unexcused tardies and unexcused absences, you must assign one category or the other to an attendance code, but not both. If an attendance code is considered both an unexcused absence (absent) and an unexcused tardy (present), then two attendance tracking records are created from one attendance code assigned to the student.

Note: For most attendance reports, attendance status is determined by the presence status (Present or Absent) of the attendance code. For attendance tracking and notification reports, however, the presence status is ignored. Instead, the student's status is determined by the unique settings used for attendance tracking.

For more information about attendance codes, see *Attendance Codes* or the *Attendance User Guide* available on PowerSource.

Summary

- Attendance codes must be set up.
- Attendance codes must be associated with the appropriate attendance code category.
- Attendance code categories must be set up to identify types of attendance.
- Separate attendance code categories must be set up for unexcused tardies and unexcused absences.
- Attendance code categories must be associated with attendance tracking categories.

Attendance Tracking District Setup

Once you have set up basic attendance, you can then define the following attendance tracking and notification settings for your district:

- Attendance Tracking Methods
- Unexcused Tracking Levels
- Illness Tracking Levels

The Percent attendance tracking method must be set up for the district. Additional attendance tracking methods are optional. Unexcused and illness levels are also optional.

Attendance Tracking Methods

The Percent attendance tracking method must be set up with a threshold in order to properly track attendance, even if only tardies are tracked. Attendance tracking methods are used to track unexcused attendance. There are no tracking methods for illness. Illness by default uses the Year method seen in the table below.

Once the Percent tracking method is set up, additional tracking methods can be set up to be used in conjunction with Percent.

The following tracking methods are available:

Tracking Method	Description
Percent (Required)	The percentage of the day the student can miss due to unexcused absence attendance. The Percent method is calculated as ‘greater than’ the value set for the threshold. For example, if you enter 50 for the threshold, the student must be absent more than 50% of the school day in order to be reported. For example, for a four-period day, the student would need to miss more than two periods due to unexcused absence.
Tardy Day	The number of periods the student can be assigned an unexcused tardy. The Tardy Day method is calculated as greater than or equal to the threshold. For example, if you enter one for the threshold, the

	student must be counted as unexcused tardy for one or more periods in order to be reported.
Consecutive	The number of consecutive days the student can miss due to unexcused absence in a year. The Consecutive method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is 99 and the Consecutive threshold is three, then the student must miss more than 99% of three consecutive school days during the school year to be reported.
Semester	The number of days the student can miss due to unexcused absence per semester. The Semester method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is set to 50 and the Semester threshold is set to four, then the student must miss more than 50% of four school days during the semester in order to be reported.
Year	The number of days the student can miss due to unexcused absence per school year. The Year method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is set to 75 and the Year threshold is set to seven, then the student must miss more than 75% of seven school days during the school year in order to be reported. **Note:** The year method is not available as an option when creating levels and is used for reporting purposes only. The Percent method calculates using the year by default, so use of the Percent method alone can be used for reporting on a year basis.

Period/Intervals	The number of periods or intervals a student can miss in a day due to an unexcused attendance. In order for this method to function as expected, the Meeting attendance mode must be selected as the “Default attendance page” via **Start Page > School Setup > [Attendance] Preferences**. The Meeting attendance mode must also be selected for the student’s Full Time Equivalency (FTE) via **Start Page > School Setup > Full-Time Equivalencies**. FTEs are assigned to students via **Start Page > Student Search > Transfer Info > Edit Enrollment**. **Note:** This method cannot be configured to track attendance in a specific period or section. Once the student is identified as meeting the threshold for any period in the day, the method does not count additional periods.
Trimester	The number of days the student can miss due to unexcused absence per Trimester. The Trimester method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is set to 50 and the Trimester threshold is set to four, then the student must miss more than 50% of four school days during the Trimester to be reported.
Quarter	The number of days the student can miss due to unexcused absence per Quarter. The Quarter method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is set to 50 and the Quarter threshold is set to four, then the student must miss more than 50% of four school days during the Quarter to be reported.
Calendar Month	The number of days the student can miss due to unexcused absence per Calendar Month.

	This method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is set to 50 and the Calendar Month threshold is set to four, then the student must miss more than 50% of four school days during the Calendar Month in order to be reported.
Calendar Week	The number of days the student can miss due to unexcused absence per Calendar Week. This method is calculated as greater than or equal to the value entered for the threshold and is combined with the Percent method. For example, if the Percent threshold is set to 50 and the Calendar Week threshold is set to four, then the student must miss more than 50% of four school days during the Calendar Week in order to be reported.

How to Add an Attendance Tracking Method

Use this procedure to add an attendance tracking method.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Tracking Methods**. The Attendance Tracking Methods page appears.
4. Click **New.** The New Attendance Tracking Method page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Choose one of the following attendance tracking methods from the pop-up menu: • **Percent** • **Tardy Day**

	• **Consecutive** • **Semester** • **Year** • **Period** • **Trimester** • **Quarter** • **Calendar Month** • **Calendar Week** **Note:** Each tracking method can only be set up once. If a tracking method has already been set up, it does not appear in the list. The Percent tracking method must be set up for all districts using attendance tracking.
Threshold	Enter the threshold for the attendance tracking method. **Note:** The threshold cannot be zero or blank.
Minimum Period/Interval Length (in Minutes)	Enter the minimum minutes required for a class period. The student must be marked unexcused for a period that is at least the minimum number of minutes in length to be reported for this tracking level. The length of a period is determined by the minutes in the bell schedule. **Note:** This field is only available for the Period/Interval tracking method.

6. Click **Submit**. The Attendance Tracking Methods page displays the new attendance tracking method.

How to Edit an Attendance Tracking Method

Use this procedure to edit an attendance tracking method.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Tracking Methods**. The Attendance Tracking Methods page appears.
4. Click the name of the attendance tracking method you want to edit. The Edit Attendance Tracking Method page appears.

5. Edit the information as needed. For field descriptions, see *How to Add an Attendance Tracking Method*.
6. Click **Submit**. The Attendance Tracking Methods page displays the edited attendance tracking method.

How to Delete an Attendance Tracking Method

Use this procedure to delete an attendance tracking method that may have been created in error or that is no longer in use.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Tracking Methods**. The Attendance Tracking Methods page appears.
4. Click the name of the attendance tracking method you want to delete. The Edit Attendance Tracking Method page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Attendance Tracking Methods page displays without the deleted attendance tracking method.

Unexcused Tracking Levels

Unexcused tracking levels are used to expand on the attendance tracking methods and thresholds. Tracking levels are optional.

For example, if you set up the tracking method Percent with a threshold of 50% and Semester with a threshold of five, you can track when a student is absent more than 50% of five school days during the semester.

Using tracking levels, you can report when the student reaches a defined number of unexcused absences (thresholds) for multiple instances (triggers). For example, you may want to track the first time the student reaches five unexcused absences, as well as the second time (ten absences) and third time (fifteen absences).

Each time a student reaches a threshold, a notification record is created in the database. Multiple records may exist per day if the student reaches a threshold for more than one attendance tracking level. These records can be used to print attendance letters for students who meet or exceed attendance thresholds.

Note: If a tracking level is changed, the notification records in the database are not automatically updated. If the district must change a tier because of new requirements, it is recommended to create a new tracking level. Optionally, the District may choose to clear all records for the level. For more information, see *How To Edit an Unexcused Tracking Level*.

Example 1: Tardy Day

Based on the table below, notification records are created in the database when the student achieves four, eight, and/or twelve unexcused tardies during the school year. The Tardy Day tracking method uses the school year timeframe by default.

Tracking Method	Threshold	Trigger	Notification
Tardy Day	4 Unexcused Tardies	1	4
		2	8
		3	12

Example 2: Semester

In this example, we have set up the Percent tracking method with 99% as the threshold, so a student must miss more than 99% of the day to be considered absent.

Based on the table below, for a tracking level using the Semester tracking method, notification records are created in the database when the student misses more than 99% of three, six, and/or nine school days during the semester.

Tracking Method	Threshold	Trigger	Notification
Semester	3 Unexcused Absences	1	3
		2	6
		3	9

Example 3: Consecutive

In this example, we have set up the Percent tracking method with 50% as the threshold, so the student must miss more than 50% of the day to be considered absent. The Consecutive tracking method uses the school year timeframe by default.

Based on the table below, for a tracking level using the tracking method Consecutive, notification records are created in the database when the student misses more than 50% of four, six, eight, and/or ten consecutive school days during the school year.

Tracking Method	Threshold	Trigger	Notification
Consecutive	2 Unexcused Absences	2	4
		3	6
		4	8
		5	10

How to Add an Unexcused Tracking Level

Use this procedure to add an unexcused tracking level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Unexcused Levels**. The Unexcused Tracking Levels page appears.
4. Click **New.** The New Unexcused Tracking Level page appears.
5. Use the following table to enter information in the fields:

Field	Description
Level Name	Enter a name for the level. **Note:** Each level name must be unique and cannot exceed 30 characters.
Tracking Method	Choose a tracking method from the pop-up menu. **Note:** The Year tracking method is not available. Tardy and Consecutive use the year time period by default.

Tracking Method	Choose a second tracking method from the pop-up menu. **Note:** You can only choose a second tracking method for Percent, Period, or Tardy Day. In other words, Percent. Period and Tardy Day are the only tracking methods that can be set up together in combination. All of the other tracking methods must be set up separately.
Tracking Method	Choose a third tracking method from the pop-up menu. **Note:** You can only choose a third tracking method for Percent, Period, or Tardy Day. In other words, Percent. Period and Tardy Day are the only tracking methods that can be set up together in combination. All of the other tracking methods must be set up separately.
Triggers	Do one of the following: • Click the **Plus (+)** button to add a new trigger. You may set up as many triggers as needed. • Click the **Minus (-)** button to remove the most recently added trigger, such as the trigger at the bottom of the list.
Trigger 1	Enter at least one trigger for this level. The trigger is a multiplier of the threshold. For example, if you have a Semester tracking method with a user-defined threshold of three and you set up a trigger of two, a notification record is created when the student reaches six unexcused absences (two multiplied by three).

6. Click **Submit**. The Unexcused Tracking Levels page displays the new tracking level.

How to Edit an Unexcused Tracking Level

Use this procedure to edit an unexcused tracking level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Unexcused Levels**. The Unexcused Tracking Levels page appears.
4. Click the name of the tracking level you want to edit. The Edit Unexcused Tracking Level page appears.
5. Use the following table to enter information in the fields:

Field	Description
Level Name	Enter a name for the level. **Note:** Each level name must be unique and cannot exceed 30 characters.
Tracking Method	Choose a tracking method from the pop-up menu. **Note:** The Year tracking method is not available. Tardy and Consecutive use the year time period by default.
Tracking Method	Choose a second tracking method from the pop-up menu. **Note:** You can only choose a second tracking method for Percent, Period, or Tardy Day. In other words, Percent. Period and Tardy Day are the only tracking methods that can be set up together as an and/or combination. All of the other tracking methods must be set up separately.
Tracking Method	Choose a third tracking method from the pop-up menu. **Note:** You can only choose a third tracking method for Percent, Period, or Tardy Day. In other words, Percent. Period and Tardy Day are the only tracking methods that can be set up together as an and/or combination. All of the other tracking methods must be set up separately.
Triggers	Do one of the following: • Click the **Plus (+)** button to add a new trigger. You may set up as many triggers as needed.

	• Click the **Minus (-)** button to remove the most recently added trigger, such as the trigger at the bottom of the list.
Trigger 1	Enter at least one trigger for this level. The trigger is a multiplier of the threshold. For example, if you have a Semester tracking method with a user-defined threshold of three and you set up a trigger of two, a notification record is created when the student reaches six unexcused absences (two multiplied by three).
Clear all existing records for this level	Select the checkbox to clear all existing records for this level. A dialog box appears warning that the records will be archived and no longer reportable. Click **OK** if you are sure you want to continue. The page is available to edit after clicking **OK**. When you are finished entering values on the page and click **Submit**, all records for this level are archived and can no longer be accessed without contacting PowerSchool Technical Support or using ODBC. Only records for the appropriate timeframe are archived. For example, if records span the school year, then only records for the current school year are archived. If records span one semester, then only records for the current semester are archived. **Note:** This option is useful if the triggers for this level were set up incorrectly, causing students to receive attendance letters when they should not.
Records Cleared Status	A message appears indicating the status of records cleared for this level.

6. Click **Submit**. The Unexcused Tracking Levels page displays the edited tracking level.

How to Delete an Unexcused Tracking Level

Use this procedure to delete an unexcused tracking level that may have been created in error or that is no longer in use.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Unexcused Levels**. The Unexcused Tracking Levels page appears.
4. Click the name of the unexcused tracking level you want to delete. The Edit Unexcused Tracking Level page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Unexcused Tracking Levels page displays without the deleted tracking level.

Illness Tracking Levels

Illness tracking levels can be used to report when a student reaches a defined number of illness absences (thresholds) for multiple instances (triggers). For example, you may want to track the first time a student reaches five illness absences, as well as the second time (ten absences) and third time (fifteen absences).

By default, illness levels use a Percent tracking method with a threshold of 99 and a timeframe of one full school year.

Each time a student reaches a threshold, a notification record is created in the database. Multiple records may exist per day if the student reaches a threshold for more than one attendance tracking level. These records can be used in reports to identify students who have reached illness attendance thresholds.

Note: If a tracking level is changed, the records in the database are not automatically updated. If the district must change a level because of new requirements, it is recommended to create a new tracking level.

Example: Illness Absences

By default, illness levels use a Percent tracking method with a threshold of 99 and a timeframe of one full school year.

Based on the table below, a notification record is created in the database when the student misses more than 99% of three, six, and/or nine school days during the school year. A total of four records are created, one detail record for each instance, plus a summary record.

Threshold	Trigger	Notification
3 Illness Absences	1	3
	2	6

	3	9

How to Add an Illness Tracking Level

Use this procedure to add an illness tracking level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Illness Levels**. The Illness Tracking Levels page appears.
4. Click **New.** The New Illness Tracking Level page appears.
5. Use the following table to enter information in the fields:

Field	Description
Level Name	Enter a name for the tracking level. **Note:** Each level name must be unique and cannot exceed 30 characters.
Triggers	Do one of the following: • Click the **Plus (+)** button to add a new trigger. • Click the **Minus (-)** button to remove the most recently added trigger, such as the trigger at the bottom of the list.
Trigger 1	Enter a trigger for this level. The trigger is a multiplier of the threshold. For example, if the Year tracking method is set up with a threshold of three and you set up a trigger of two, a notification record is created when the student reaches six illness absences (two multiplied by three).

6. Click **Submit**. The Illness Tracking Levels page displays the new illness tracking level.

How to Edit an Illness Tracking Level

Use this procedure to edit an illness tracking level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Illness Levels**. The Illness Tracking Levels page appears.
4. Click the name of the level you want to edit. The Edit Illness Tracking Level page appears.
5. Use the following table to enter information in the fields:

Field	Description
Level Name	Enter a name for the tracking level. **Note:** Each level name must be unique and cannot exceed 30 characters.
Triggers	Do one of the following: • Click the **Plus (+)** button to add a new trigger. • Click the **Minus (-)** button to remove the most recently added trigger, such as the trigger at the bottom of the list.
Trigger 1	Enter a trigger for this level. The trigger is a multiplier of the threshold. For example, if the Year tracking method is set up with a threshold of three and you set up a trigger of two, a notification record is created when the student reaches six illness absences (two multiplied by three).
Clear all existing records for this level	Select the checkbox to clear all existing records for this level. A dialog box appears warning that the records will be archived and no longer reportable. Click **OK** if you are sure you want to continue. The page is available to edit after clicking **OK**. When you are finished entering values on the page and click **Submit**, all records for this level are archived and can no longer be accessed without contacting PowerSchool Technical Support or using ODBC.

	Only records for the appropriate timeframe are archived. For example, if records span the school year, then only records for the current school year are archived. If records span one semester, then only records for the current semester are archived. **Note:** This option is useful if the triggers for this level were set up incorrectly, causing students to receive attendance letters when they should not.
Records Cleared Status	A message appears indicating the status of records cleared for this level.

6. Click **Submit**. The Illness Tracking Levels page displays the edited illness tracking level.

How to Delete an Illness Tracking Level

Use this procedure to delete an illness tracking level that may have been created in error or that is no longer in use.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Illness Levels**. The Illness Tracking Levels page appears.
4. Click the name of the illness tracking level you want to delete. The Edit Illness Tracking Level page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Illness Tracking Levels page displays without the deleted illness tracking level.

Calculation Year

The calculation year determines the school year associated with Attendance Tracking and Notification. This setting affects reporting, since attendance reporting is year specific.

In order to change the calculation year, the appropriate term must be set up at both the district and the school via **Years & Terms**. For example, to change the calculation year to 2012-2013, the 2012-2013 school year term must be set up at the district office and at each appropriate school. For more information, see *Years and Terms*.

The Update Calculation Year utility provides the ability to change the calculation year for all schools or an individual school. In order for a school to appear in the available list of schools to update, an attendance tracking mode must be defined for the school. For more information, see *Attendance Tracking Modes*.

How to Update the Calculation Year for All Schools

Use this procedure to update the calculation year for all schools that use Attendance Tracking and Notification. The correct term must be selected at the top of the page in order to change the calculation year for all schools.

1. On the start page, choose **Term** at the top of the page. The Change Term page appears.
2. Choose the appropriate term from the **Change to** pop-up menu. The start page appears.
3. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
4. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
5. Click **Update Calculation Year**. The Update Calculation Year page appears. A message at the bottom of the screen displays the value that will be set, based on the term selected at the top of the page. Verify this value before submitting the page. EX: On submit, year will be set to: 2010-2011
6. Click **Submit**. A validation message appears to verify that the Calculation Year will be updated for all schools listed on the page.

   Note: If the selected term is not set up for one or more schools in the list, a validation message appears indicating that the term does not exist for that school. If a term is missing, switch to the school, set up the term via **Years & Terms**, and then return to the district to proceed with updating the calculation year.

7. Click **OK**. The Update Calculation Year page appears with the updated year value for each school.

How to Update the Calculation Year for an Individual School

Use this procedure to update the calculation year for an individual school. An attendance tracking mode must be defined for the school in order for it to appear on the page.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Update Calculation Year**. The Update Calculation Year page appears.
4. Click the name of the appropriate school. The Edit Calculation Year for (school name) page appears.
5. Choose the appropriate term from the **Select Year** pop-up menu.

   Note: The terms displayed are set up for the individual school. If a term is missing, switch to the school, set up the term via **Years & Terms**, and then return to the district to proceed with updating the calculation year.

6. Click **Submit**. The Update Calculation Year page appears with the update year listed for the school.

Attendance Tracking School Setup

Once you have set up attendance tracking and notification settings for your district, you can then define the following attendance tracking and notification settings for each of your schools:

- Attendance Tracking Mode
- Unexcused Tracking Categories (Absent and Tardy)
- Illness Tracking Categories (Absent only)

One attendance tracking mode is required per school. You may set up as many attendance tracking categories as needed for the school.

Attendance Tracking Modes

Only one attendance tracking mode may be defined at a time. The same attendance tracking mode is used by both unexcused and illness attendance tracking categories.

How to Add an Attendance Tracking Mode

Use this procedure to add an attendance tracking mode.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Attendance Mode Setup**. The Attendance Mode page appears.
4. Click **New**. The New Attendance Tracking Mode page appears.

   Note: Only one attendance tracking mode can be set up per school.

5. Choose the attendance mode value from the **Attendance Mode Value** pop-up menu:
   - **(MPTD) Meeting Period To Day**
   - **(MTTD) Meeting Time To Day**
   - **(DCTD) Daily Code To Day**
   - **(DTTD) Daily Time To Day**
   - **(ITVL) Interval**
6. Click **Submit**. The Attendance Tracking Mode page displays the new attendance tracking mode.

How to Edit an Attendance Tracking Mode

Use this procedure to edit an attendance tracking mode.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Attendance Mode Setup**. The Attendance Mode page appears.
4. Click the attendance mode you want to edit. The Edit Attendance Tracking Mode page appears.

   Note: Only one attendance tracking mode can be set up per school.

5. Edit the information as needed. For field descriptions, see *How to Add an Attendance Tracking Mode*.

How to Delete an Attendance Tracking Mode

Use this procedure to delete an attendance tracking mode that may have been created in error or that is no longer in use.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Attendance Mode Setup**. The Attendance Mode page appears.
4. Click the attendance tracking mode you want to delete. The Edit Attendance Tracking Mode page appears.
5. Click **Delete** to remove the attendance tracking mode. The Attendance Tracking Mode page displays without the deleted attendance tracking mode.

Unexcused Tracking Categories

Once an attendance tracking mode is defined, you may define as many attendance tracking categories as needed.

The following unexcused tracking categories can be set up for each school:

- Unexcused absence tracking category
- Unexcused tardy tracking category

Each unexcused tracking category must be associated with the appropriate attendance code category. You must set up attendance code categories before proceeding. For more information, see *Basic Attendance Setup*.

When a student is assigned unexcused attendance, a detail record is created in the database with the record type A (absent) or T (tardy), as well as a summary record with record type TA (absent) or TT (tardy). There may be multiple detail records per day if the school uses meeting attendance.

How to Add an Unexcused Tracking Category

Use this procedure to add an unexcused tracking category.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Unexcused Tracking Setup**. The Unexcused Tracking Categories page appears.
4. Click **New.** The New Unexcused Tracking Category page appears.

   Note: If all of the attendance code categories for your school have been associated with an unexcused tracking category, the **New** button is no longer available. You must edit or delete an existing record in order to create a new record.

5. Use the following table to enter information in the fields:

Field	**Description**
Tracking Category	The tracking category displays Unexcused. **Note:** This field is read-only.
Attendance Category	Choose the attendance code category used to track unexcused absences or tardies from the pop-up menu. Attendance code categories can only be used once, so the pop-up menu displays all attendance code categories set up for your school, except for those already associated with an unexcused tracking category. Note that if you track both tardies and

	unexcused absences, you must have separate attendance code categories for each. **Note:** You must set up attendance code categories prior to configuring this parameter. For more information, see *Basic Attendance Setup*.
Status	Select one of the following options: • **Absent** – Indicates that this unexcused tracking category is used to track absences. • **Tardy** – Indicates that this unexcused tracking category is used to track tardies.

6. Click **Submit**. The Unexcused Tracking Category page displays the new unexcused tracking category. You may want to create a second attendance tracking category, either to track absences or tardies, depending on how you set up the first category.

How to Edit an Unexcused Tracking Category

Use this procedure to edit an unexcused tracking category.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Unexcused Tracking Setup**. The Unexcused Tracking Categories page appears.
4. Click the name of the unexcused tracking category you want to edit. The Edit Unexcused Tracking Category page appears.
5. Edit the information as needed. For field descriptions, see *How to Add an Unexcused Tracking Category*.
6. Click **Submit**. The Unexcused Tracking Category page displays the edited unexcused tracking category.

How to Delete an Unexcused Tracking Category

Use this procedure to delete an unexcused tracking category that may have been created in error or that is no longer in use.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Unexcused Tracking Setup**. The Unexcused Tracking Categories page appears.
4. Click the name of the unexcused tracking category you want to delete. The Edit Unexcused Tracking Category page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Unexcused Tracking Categories page appears without the deleted unexcused tracking category.

Illness Tracking Categories

Multiple illness tracking categories can be set up for each school to track illness absences. Each illness tracking category must be associated with the appropriate attendance code category. You must set up attendance code categories before proceeding. For more information, see *Basic Attendance Setup*.

When a student is assigned illness attendance, a detail record is created in the database with the record type I, as well as a summary record with record type TI. There may be multiple detail records per day if the school uses meeting attendance.

How to Add an Illness Tracking Category

Use this procedure to add an illness tracking category.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Illness Tracking Setup**. The Illness Tracking Categories page appears.
4. Click **New.** The New Illness Tracking Category page appears.

   Note: If all of the attendance code categories have been associated with an illness tracking category, the **New** button is no longer available. You must edit or delete an existing record in order to create a new record.

5. Use the following table to enter information in the fields:

Field	Description

Tracking Category	The tracking category displays Illness. **Note:** This field is read-only.
Attendance Category	Choose the attendance code category used to track illness absences from the pop-up menu. Attendance code categories can only be used once, so the pop-up menu displays all attendance code categories set up for your school, except for those already associated with an illness tracking category. **Note:** You must set up attendance code categories prior to configuring this parameter. For more information, see *Basic Attendance Setup*.

6. Click **Submit**. The Illness tracking category page displays the new illness tracking category.

How to Edit an Illness Tracking Category

Use this procedure to edit an illness tracking category.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Illness Tracking Setup**. The Illness Tracking Categories page appears.
4. Click the name of the illness tracking category you want to edit. The Edit Illness Tracking Category page appears.
5. Edit the information as needed. For field descriptions, see *How to Add an Illness Tracking Category*.
6. Click **Submit**. The Illness Tracking Category page displays the edited illness tracking category.

How to Delete an Illness Tracking Category

Use this procedure to delete an illness tracking category that may have been created in error or that is no longer in use.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Attendance, click **Attendance Tracking and Notification**. The Attendance Tracking and Notification page appears.
3. Click **Illness Tracking Setup**. The Illness Tracking Category page appears.
4. Click the name of the illness tracking category you want to delete. The Edit Illness Tracking Category page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Illness Tracking Category page appears without the deleted illness tracking category.

Attendance Tracking Reports

There are three Attendance Tracking and Notification reports, which must be run in the following order:

1. Refresh Attendance Tracking Data – used to update attendance tracking and notification records in the PowerSchool database.
2. Truancy and Attendance Letters (View Only & Extract) – used to view dates that students received truant attendance. The Extract version of this report can be used to print attendance letters for parents and/or guardians.
3. Truancy and Attendance **–** Levels Reached – used to view dates that attendance letters were sent to a student's parent, as well as dates that student truant attendance was cleared (excused).

Refresh Attendance Tracking Data Report

The Refresh Attendance Tracking Data report creates Attendance Tracking records for students with truant attendance. The purpose of the report is to identify attendance that requires administrative or parental attention, such as excessive unexcused absences, unexcused tardies, or illness absences. Once this information is calculated and stored in the PowerSchool database, it can be used when printing attendance letters.

Note: It is recommended to complete the Refresh Premier Attendance Views Data process before running this report. To access this function, navigate to **Start Page > Special Functions** under Functions in the main menu **> Attendance Functions > Refresh Premier Attendance Views Data**.

The Refresh Attendance Tracking Data report performs the following processes:

1. **Detail Record:** The report creates one detail record for each truant attendance instance. There may be multiple detail records per student per day if the school uses Meeting attendance. The detail record types are:
    - **A** (absent)
    - **T** (tardy)
    - **I** (illness)
2. **Summary Record:** The report creates one summary record for the student for the day, if the student has a detail record for that day. The summary record types are:
    - **TA** (absent)
    - **TT** (tardy)
    - **TI** (total illness)
3. **Notification Record:** The report creates a notification record for the student if he/she has enough truant attendance records to require parent notification, such as

if the student's records meet or exceed an attendance tracking threshold (set up at the District).

For example, you may track unexcused absences. At the school level, you set up an attendance code category named Unexcused Absence (UA), and you choose Meeting-Period-to-Day (MPTD) as the attendance mode used for attendance tracking and notification.

With this setup, the report creates a detail record for each attendance record associated with the UA attendance code category. Next, the report creates a summary record for each day where the student has a detail record. Finally, the report creates a notification record if the student's detail records meet or exceed an attendance tracking threshold, based on the MPTD attendance mode.

Note: This process must be completed prior to reports that require attendance tracking and notification data, including Truancy and Attendance Letters.

How to Run the Refresh Attendance Tracking Data Report

This report must be run at the district level.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Refresh Attendance Tracking Data**. The Refresh Attendance Tracking Data Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
Processing Options	Choose a time to run the report from the pop-up menu: • **In Background Now** (Recommended) – Execute the report immediately in the background. • **ASAP** – Execute the report in the order it is received in the Report Queue. • **At Night** – Execute the report during the next evening. • **On Weekend** – Execute the report during the next weekend. • **On Specific Time** – Execute the report on the date and time specified.

Specific Date/Time	Enter a date using the format mm/dd/yyyy or mm-dd-yyyy in order to run the report on a specific day. The incorrect format displays an alert and the date field is submitted as a blank entry. Use the pop-up menus to schedule the report to be run at a specific hour and minute. For example, 7/29/2008 @ 10:05 AM.

4. Click **Submit**. The Report Queue page appears.
5. When the report completes, click **View**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
6. Click **View** to view the report results. A dialog window appears.
7. Do one of the following:
   - Save the file to your hard drive and then open the file using a text editor application, such as TextEdit or NotePad.
   - Save the file to your hard drive and then open the file using your web browser.
   - Open the file in your web browser.

   Note: A blank result file indicates data issues in the PowerSchool database, such as duplicate attendance records or duplicate FTEs. Investigate possible data issues before proceeding with attendance tracking and notification reports.

8. Use the following table to review the report results:

Data Element	Description
WARNING: Attendance Mode not defined for the following	This warning may display if one or more schools is missing a value for the attendance tracking mode. Attendance tracking and notification data is only processed for schools with an attendance tracking mode. For more information, see *Attendance Tracking Modes*.
Schools Loaded	**Note:** A school must have an attendance tracking mode selected in order to be included in the report. For each school reported, the following data is displayed:

School	The name of the school.
Year	The Calculation Year associated with this school. For example: • Year: 19 = 2009-2010 School Year • Year: 20 = 2010-2011 School Year • Year: 21 = 2011-2012 School Year
Mode	The attendance tracking mode associated with this school. Valid values include: • (MPTD) Meeting: Period To Day • (MTTD) Meeting: Time To Day • (DCTD) Daily: Code To Day • (DTTD) Daily: Time To Day • (ITVL) Interval
Calculation Year (Year ID) for Levels	The Calculation Year that will be used. This value is based on the term selected at the top of the page when the Refresh Attendance Tracking Data report was initiated.

Truancy and Attendance Letters Report (View Only and Extract)

Use the *View Only* version of this report to review the dates that students received truant attendance that requires parental notification – the date that attendance met or exceeded the threshold of an attendance tracking level.

Use the *Extract* version of the report to record the date that the parent was notified (the date the report completes, usually the current date). This date represents the date that the attendance letter was printed and sent to the students' parents or guardians. Setting the "date extracted" cannot be reversed, so it is recommended to verify data using the *View Only* version before running the *Extract* version.

The *View Only* version of this report produces the first output below. The *Extract* version of this report produces both of the following two outputs:

- A list of students who meet or exceed a specified threshold for an attendance tracking level. This output includes the ability to immediately access a student in the list by clicking the student's name.

- An attendance letter to be printed via a ReportWorks report.

  Note: ReportWorks must be set up prior to accessing reports. For more information, see the *ReportWorks Setup and Administration Guide* on PowerSource.

The first time you run the extract for each attendance tracking level and trigger, all records are returned that meet the level and trigger. Subsequently, records are only returned if they met level and trigger since the last time the extract was run.

Note: You must run the *Refresh Attendance Tracking Data* report before the Truancy and Attendance Letters report.

How to Run the Truancy and Attendance Letters Report

Both the *View Only* and *Extract* versions of this report must be run at the school level.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Truancy and Attendance Letters (Extract/View)**. The Truancy and Attendance Letters (Extract/View) Report page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Grades (leave blank for all)	Select the checkbox for the appropriate grade levels. The page displays the grade levels associated with this school.
Data to be Filled	Select the checkbox next to the filter fields to save the settings as defaults. To select all checkboxes, choose **Set All** from the pop-up menu. To clear all checkboxes, choose **Reset All**.
Extraction Type	Choose Unexcused or Illness from the pop-up menu.
Level Name	Choose the appropriate attendance tracking level from the pop-up menu.
Trigger	Choose the trigger you would like to report from the pop-up menu.

Minimum Age to Extract	Enter the minimum age of students to include in the report.

4. Click **Submit**. The Report Queue page appears.
5. When the report completes, click **View**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
6. Use the following table to review the report results:

Data Element	Description
Student	The student's full name. Click the student's name to access that student. **Note:** The report includes both active and inactive (transferred out) students in the current school.
Student Number	The student's locally assigned student number.
Qualified School	The school in which the attendance occurred. **Note:** If the line is highlighted with yellow, this indicates that the student is no longer enrolled in the school in which attendance occurred. Thus, the Current School is different than the Qualified School.
Current School	The school in which the student is currently enrolled.
Date Reached	The date the student's attendance met or exceeded an attendance tracking threshold.
Semester	If the Semester tracking method is used, then the report indicates whether the attendance occurred in the 1st or 2nd semester. **Note:** This designation is based on the ID of the term in the database. In order to have the correct ID, you must create your Years & Terms in the correct order, such as year, semester 1, semester 2.

Grade	The student's grade level.
DOB	The student's date of birth.
Phone	The student's home phone number.
Absent Dates	The date of each unexcused absence record associated with the tracking level and trigger selected at report runtime.
Tardy Dates	The date of each unexcused tardy record associated with the tracking level and trigger selected at report runtime.

7. Do one of the following:
    - **Set as current selection** (*View Only* version): Click the button to work with the selection of the students. The Group Functions page appears.
    - **ReportWorks** (*Extract* version): Click **ReportWorks** to access the list of ReportWorks reports for your school. Choose the appropriate Attendance Letters report.

      Note: The Attendance Letters template must be published in ReportWorks before it will be available as a report. The PowerSchool installation includes one Attendance Letters template for the district. If different attendance letters are required for schools on the server, it is recommended to publish the template with a different name for each school. For more information, see the *ReportWorks Setup and Administration Guide* on PowerSource.

Truancy and Attendance – Levels Reached Report

Use the Truancy and Attendance – Levels Reached report to view one or more of the following groups of students:

- Students whose parents have been notified of their truant attendance, with the date the parent were notified.
- Students whose attendance has been cleared; such as the student is no longer considered truant, with the date the attendance was cleared.
- Students whose parents haven't been notified and for whom attendance has not been cleared.

Note: You must run the *Refresh Attendance Tracking Data* and *Truancy and Attendance Letters (Extract)* reports before the Truancy and Attendance – Levels Reached report.

How to Run the Truancy and Attendance – Levels Reached Report

This report must be run at the school level.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Truancy and Attendance – Levels Reached**. The Truancy and Attendance – Levels Reached Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
Data to be Filled	Select the checkbox next to the filter fields to save the settings as defaults. To select all checkboxes, choose **Set All** from the pop-up menu. To clear all checkboxes, choose **Reset All**.
Extraction Type – leave blank for all	Choose Unexcused or Illness from the pop-up menu.
Filter by Level Name – leave blank for all	Choose the appropriate attendance tracking level from the pop-up menu.
Filter by Trigger – leave blank for all	Choose the trigger you would like to report from the pop-up menu.
Students Extracted	Select the checkbox to view a list of students who were extracted in the *Truancy and Attendance Letters (Extract)* report, with the date extracted.
Students Cleared	Select the checkbox to view a list of students whose attendance records were cleared (no longer qualify for tracking or notification) in the *Refresh Attendance Tracking Data* report, with the date cleared.

Students Not Extracted (and not Cleared)	Select the checkbox to view a list of students who were not extracted and whose attendance records were not cleared.

4. Click **Submit**. The Report Queue page appears.
5. When the report completes, click **View**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
6. Use the following table to review the report results:

Data Element	Description
Student	The student's full name. **Note:** The report includes both active and inactive (transferred out) students in the current school.
Student Number	The student's locally assigned student number.
Grade	The student's grade level.
Level Name	The name of the attendance tracking level.
Trigger	The trigger associated with the attendance tracking level.
Date Reached	The date the student received truant attendance.
Date Extracted	The date the student's truant attendance was extracted in the *Truancy and Attendance Letters (Extract)* report.
Date Cleared	The date the student's previous truant attendance was cleared using the *Refresh Attendance Tracking Data* report.

Attendance User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool's attendance function makes it possible to track students' attendance in a number of ways. Depending on your school's needs, you can track either daily attendance, section attendance, or attendance by time. You can also consolidate the multiple roll calls normally required when multiple course sections meet at the same time. For more information, see *Daily Attendance*, *Meeting Attendance*, *Interval Attendance*, *Time Attendance*, and *Concurrent Attendance*.

Given the proper permissions, administrators, teachers, and substitute teachers can take attendance using the following:

- PowerSchool: There are several ways to take and change attendance in PowerSchool for a student or group of students, either for one day or several days.
- PowerTeacher: Teachers can use PowerTeacher's attendance function to take attendance for their current classes. For more information, see the PowerTeacher online help or the *PowerTeacher User Guide*.
- PowerTeacher Substitute: Substitute teachers can use PowerTeacher Substitute to take attendance for their designated classes. For more information, see the PowerTeacher Substitute online help or the *PowerTeacher Substitute User Guide*.

A number of attendance-related reports are available. For more information, see *Attendance Count and Audit Reports* and *Attendance Reports*.

Attendance Modes

There are five modes of taking attendance; by day, by meeting, by interval, by time, or concurrently.

Note: To switch between Daily and Meeting attendance mid-year, see *Attendance Synchronization*.

Daily Attendance

In PowerSchool, you can take attendance for one or more days. The Daily Attendance function calculates attendance by the minute or by attendance code.

Meeting Attendance

In PowerSchool and PowerTeacher, you can take attendance by meeting. The meetings for a section are represented by an expression, the combination of periods and days in which this section is taught. For example, a section of Biology that meets during first and second period on "A" day has an expression of "1-2(A)." As another example, a section of Biology that meets during fifth and sixth period on "A" and "B" days has an expression of "5-6(A-B)." Each expression, such as "1-2(A)" and "5-6(A-B)," represents all the meetings for the section.

Note: PowerSchool provides fields to display in place of periods and days values, called "expressions." When an expression is displayed anywhere in the system, PowerSchool uses these fields instead of the internal values. For example, a section's expression of "1-2(A)" where "1" has an abbreviation of "P1" and "A" an abbreviation of "DA," displays as "P1(DA)."

Interval Attendance

Interval attendance is similar to Meeting attendance in that attendance is taken at least once during any meeting. The difference is that, with Interval attendance, attendance can be recorded more than once per meeting. The number of times is determined by the length of the period (or periods) in which the meeting takes place and by the specified interval duration. The length of the periods is determined by the bell schedule (see *How to Set Up Bell Schedules*) and the interval duration is specified in *School Attendance Preferences*. The system divides the length of each period by the interval duration (always rounding up) to calculate the number of times attendance can be recorded. For example, a class that takes place from 8:00 AM to 9:30 AM would be 90 minutes long. If the interval duration was 60 minutes, the class would have two opportunities to take attendance: once at the beginning of the period and once after 60 minutes has passed. Interval attendance is primarily intended for those programs in which attendance must be recorded each hour. Whether a class uses interval attendance is specified in the *Section Setup* for each class. Interval attendance can be recorded in PowerSchool and PowerTeacher.

Interval attendance makes no assumptions that a student is present or absent. As opposed to meeting or daily attendance which assume a student is present unless an attendance code indicating otherwise is found, Interval attendance requires that a code be recorded for each interval.

Note: Interval Attendance allows users to enter attendance for a class at specified clock-based intervals instead of only once per meeting. In the context of Alternative Education Programs (AEP), this saves staff the time and effort spent on manually associating attendance with specific programs. For more information about California's Alternative Education Program (CA AEP), visit PowerSource.

Time Attendance

Time attendance provides an opportunity to directly enter an attendance value for a student by entering total minutes (or hours) for a given day. The attendance is not related to a course, but it can be related to a program for which the student is enrolled. For this reason, it is very useful for work experience hours or independent study hours. Time attendance can only be entered through PowerSchool. It is not available in PowerTeacher.

Note: Time Attendance allows the administrator to enter attendance hours and minutes for programs that involve work outside of a specific course, such as independent study or work experience time. In the context of Alternative Education Programs (AEP), this allows for heightened assurance that credits are tracked toward timely graduation for students. For more information about California's Alternative Education Program (CA AEP), visit PowerSource.

Concurrent Attendance

In PowerTeacher, you can take attendance for concurrently meeting sections. Concurrently meeting sections are different sections that meet at the same time and place and have the same teacher. Teachers can choose to combine the sections' rosters and take attendance for both sections at the same time.

Taking attendance concurrently by meeting is helpful for teachers who instruct sections that share the same meeting, since all students for that meeting appear on one list, regardless of their sections.

Example 1

If a teacher teaches Spanish, SPA100, with a "1(A)" meeting, and a second section of Spanish, SPA200, also with a "1(A)" meeting, the teacher could use the concurrent attendance function to take attendance for both sections at the same time.

Example 2

If a teacher teaches English 1-3(A) (Record Once All Meetings), TA1 1(A), TA2 2(A), TA3 3(A), and Math 4(A), the teacher can take attendance for English and then click "Record MultiMeeting Attendance for Multiple Sections," which results in the combined roster of English + TA1.

Example 3

If a teacher teaches English 1-3(A) (Record Once All Meetings), TA1 2(A), and TA2 2(A), the teacher can navigate to the attendance page for TA2 1-2(A) and click "Record MultiMeeting Attendance for Multiple Sections," which results in the combined roster of English + TA1 + TA2.

Example 4

If a teacher teaches English 1-3(A) (Record Each Meeting), TA1 1(A), TA2 2(A), TA3 3(A), and Math 4(A), the teacher can take attendance for English (period 1) and then click 'Record Meeting Attendance for Multiple Sections," which results in the combined roster of English (per1) + TA1.

Example 5

If a teacher teaches English 1-3(A) (Record Each Meeting), TA1 1(A), TA2 2(A), TA3 3(A), and Math 4(A), the teacher can take attendance for English (per2) and then click "Record Meeting Attendance for Multiple Sections," which results in the combined roster of English (per2) + TA2.

Attendance Setup

All attendance setup is performed at the school level under School Setup. All attendance-related setup items are located under the Attendance category. In addition, you must set up other school-related items that work in conjunction with attendance. The following list outlines the recommended attendance setup process:

- Years and Terms
- Days
- Periods
- Attendance Preferences
- FTE Codes
- Attendance Conversions
- Bell Schedules
- Calendar
- Reporting Segments
- Attendance Code Categories
- Attendance Codes
- Schedules, including Section Attendance Settings
- Class Exclusions

Recording Attendance

There are three ways to mark or change an attendance record in PowerSchool:

- Mark or change a single attendance instance.
- Mark or change a student’s attendance records for blocks of time. This is particularly useful when the student has been or will be out for an extended period.

- Mark or change a group of student’s attendance records for blocks of time. This is particularly useful when a class goes on a field trip or for sporting events.

Use any or all of the methods either to change a record from the past where a code has already been entered or to enter new data for an unmarked date range, day, or period in the past or future.

Administration

Attendance Code Categories

Attendance code categories are used to group attendance codes by classification, beyond Present or Absent, for reporting and searching purposes. Use the Attendance Code Categories page to view, add, delete, or edit the attendance code categories used at your school.

Note that attendance code categories are the one exception to year-specific data. Attendance code categories are a constant and should not be deleted from any year that uses them.

Tardy and Excused attendance code categories are set up by default and should not be deleted. In order for an attendance code to count as tardy, the attendance code must be associated to the attendance code category of Tardy. In order for an attendance code to count as excused, the attendance code must be associated to the attendance code category of Excused. Similarly, if you create other attendance code categories, in order for an attendance code to count as the attendance code category, the attendance code must be associated to that attendance code category.

Note: Attendance code categories are not used to group attendance codes by Present or Absent. All attendance codes are categorized as Present or Absent when creating the attendance code via the Attendance Code page. For more information, see *Attendance Codes*.

After creating attendance code categories, proceed to creating attendance codes. Attendance must be set up completely before taking attendance in PowerSchool.

For more information about attendance, see *Attendance Overview*.

How to Access the Attendance Code Categories Page

You can create as many categories as needed. Tardy and Excused are available by default.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page displays the following information:

Field	Description

Code	The code representing the attendance code category. This value is used in various data access tags, such as **^(per.att)**.
Name	The name of the attendance code category. **Note:** This field is currently not used anywhere else in PowerSchool.
Description	A description of the attendance code category.
Sort	The sort order of the attendance code category as it appears in the Code Categories list of checkboxes on the New/Edit Attendance Code pages.

How to Add an Attendance Code Category

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Click **New**. The New Attendance Code Category page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the attendance code category. This value is used in various data access tags, such as **^(per.att)**.
Name	Enter a name of the attendance code category. **Note:** This field is currently not used anywhere else in PowerSchool.
Description	Enter a description of the attendance code category.

Sort order for display	Use the pop-up menu to indicate the sort order of the attendance code category as it appears in the Code Categories list of checkboxes on the New/Edit Attendance Code pages.

5. Click **Submit**. The Attendance Code Categories page displays the new attendance code.

How to Edit an Attendance Code Category

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Click the code of the attendance code category you want to edit. The Edit Attendance Code Category page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Attendance Code Category*.
5. Click **Submit**. The Attendance Code Categories page displays the edited attendance code.

How to Delete an Attendance Code Category

When deleting an attendance code category, other users and student records may be directly impacted. Deleting an attendance code category is not recommended unless the attendance code category was created in error. If the attendance code category is already in use, it cannot be deleted.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Click the code of the attendance code category you want to delete. The Edit Attendance Code Category page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Sort Attendance Code Categories

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Choose different sort orders for the attendance code category from the **Sort** pop-up menus.
4. Click **Submit**. The page re-sorts the attendance code categories.

Attendance Codes

Attendance codes are used to define values, points, and calculations for school-specific attendance codes. Use this page to view, add, delete, or edit an attendance code used at your school. You must set up attendance codes before taking attendance in PowerSchool.

Note: Before you can set up attendance codes, you must set up attendance code categories. For more information, see *Attendance Code Categories*.

For more information about attendance, see *Attendance Overview*.

How to Access the Attendance Code Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page displays the following information:

Field	Description
Code	The attendance code appears.
Description	A description of the attendance code appears.
Teachers Assign	Indicates whether teachers can assign this attendance code in PowerTeacher.
Counts ADA	Indicates whether the attendance code counts towards average daily attendance (ADA).
Presence	Indicates whether the attendance code counts towards membership totals.

Sort	The sort order of the attendance code appears as it is in the attendance codes pop-up menu on the student attendance pages.

How to Add an Attendance Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Click **New**. The New Attendance Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter an attendance code. Attendance codes can use characters A-Z, 0-9 and _- (underscore and hyphen). Attendance codes are not case-sensitive. There are other restrictions, including the code must be unique for this school and year and cannot be the same name as a Code Category for this school. **Note:** By default, only single-character attendance codes are allowed. However, to create multiple-character attendance codes, select the **Enable multiple character attendance codes** checkbox on the Attendance Preferences page.
Description	Enter a description for the attendance code.
Presence Status	All attendance codes are categorized as present or absent. Indicate whether the attendance code should be categorized as present or absent by selecting the appropriate option.
Code Categories	Attendance code categories are used to group attendance codes by classification for reporting and searching purposes. In order for an attendance code to count as an attendance code category, the attendance code must be associated to that attendance code category. Indicate which attendance code category you want to associate to this attendance code by selecting the appropriate checkbox.

Points	Enter the number of attendance points a student receives for this attendance code, such as absent=1, tardy=2, and present=0.
Teacher can assign	Use the pop-up menu to choose whether teachers can assign this attendance code in PowerTeacher.
This attendance code is considered in ADA calculations	Select the checkbox if this attendance code should be considered in Average Daily Attendance (ADA) calculations.
This attendance code counts towards membership	Select the checkbox if this attendance code counts towards Average Daily Membership (ADM).
Sort order for display	Use the pop-up menu to choose a sort order of this attendance code as it appears in the attendance codes pop-up menu on the student attendance pages.

5. Click **Submit**. The Attendance Codes page displays the new attendance code.

How to Edit an Attendance Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Click the code or description of the attendance code you want to edit. The Edit Attendance Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Attendance Code*.
5. Click **Submit**. The Attendance Codes page displays the edited attendance code.

How to Delete an Attendance Code

When deleting an attendance code, other users and student records may be directly impacted. Deleting an attendance code is not recommended unless the attendance code was created in error. If the attendance code is already in use, it cannot be deleted.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Click the code or description of the attendance code you want to delete. The Edit Attendance Code page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Sort Attendance Codes

Though you must choose a sort order of 1 for the "present" attendance code, you can change the sort order of the other attendance codes without using the Edit Attendance Code page.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Choose different sort orders for the attendance codes from the **Sort** pop-up menus.
4. Click **Submit**. The page re-sorts the attendance codes.

Full-Time Equivalencies

Attendance calculations support full-time equivalencies (FTEs). FTEs are a powerful tool used in schools that need to associate groups of students with different attendance values for the same day, for example, full-time and half-time students.

FTEs are also used to determine default settings for reporting on Average Daily Attendance and Average Daily Membership (ADA/ADM). These settings include the default attendance mode and their conversion types. For **Meeting**, you can choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. For **Daily**, you can choose **Code to Day**, **Percent Time to Day**, or **Time to Day**. And, for **Interval**, you can choose **Time to Day**. FTEs are school- and year-specific but will be duplicated when new years are created.

Using Full-Time Equivalencies (FTE) page, you can set up and use FTEs to indicate what portion of a school day students attend.

Note: If this is the first time you have accessed the Full-Time Equivalencies (FTE) page, you will notice an FTE of 1 was created. This is to maintain backwards compatibility, as previously PowerSchool assumed students were full-time.

For more information about attendance, see *Attendance Overview*.

Set Students' FTEs

Once attendance is set up, you will need to set students' FTEs for school enrollments via the student Transfer Information page.

FTE is a grouping that associates a student's school enrollment with a set of attendance conversion values. When ADA runs, for a student, it runs for each school enrollment during the report dates. When processing each school enrollment, it uses the student's FTE to locate the set of attendance conversions to use when looking up the attendance value for the day. For more information, see *Transfer Information*.

How to Access the Full-Time Equivalencies Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page displays the following information:

Field	Description
Name	The name of the FTE as it appears in the Full-Time Equivalency pop-up menu on the Edit Current/Previous Enrollment pages. The pop-up menu is used to associate an FTE with a student's current and historical school enrollment.
Description	A description of the FTE code.
Default Attendance Mode	Attendance mode that will be used for reporting purposes if a specific mode is not provided.
Default Attendance Conversion	Attendance conversion that will be used for reporting purposes if a specific conversion is not provided.

How to Add an FTE Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page appears.
3. Click **New**. The New FTE Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the FTE as you want it to appear in the Full-Time Equivalency pop-up menu on the Edit Current/Previous Enrollment pages. The pop-up menu is used to associate an FTE with a student's current and historical school enrollment.
Default Attendance Mode	Choose one of the attendance mode from the pop-up menu that will be used for reporting purposes if specific mode is not provided: • **Meeting** • **Daily** • **Interval**
Default Attendance Conversion	Choose the attendance conversion from the pop-up menu that will be used for reporting purposes if a specific conversion is not provided. If you selected **Meeting** as your **Default Attendance Mode**, you can choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. If you selected **Daily** as your **Default Attendance Mode**, you can choose **Code to Day**, **Percent Time to Day**, or **Time to Day**. If you selected **Interval** as your **Default Attendance Mode**, you can choose **Time to Day**.
Description	Enter a description of the FTE code.
Default for These Grades	Indicate which grades you want the FTE code to be applied to by selecting the appropriate checkboxes. These checkboxes determine what FTE a student of a particular grade level will be assigned when the End of Year process moves them into their new grade for the next year. The values should be defined for the upcoming school year's FTEs before running the End of Year process for the current school year.

5. Click **Submit**. The Full-Time Equivalencies (FTE) page displays the new FTE code.

How to Edit an FTE Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page appears.
3. Click the name or description of the FTE code you want to edit. The Edit FTE Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an FTE Code*.
5. Click **Submit**. The Full-Time Equivalencies (FTE) page displays the edited FTE code.

How to Delete an FTE Code

When deleting an FTE code, other users and student records may be directly impacted. Deleting an FTE code is not recommended unless the FTE code was created in error. If the FTE code is already in use, it cannot be deleted.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page appears.
3. Click the name or description of the FTE code you want to delete. The Edit FTE Code page appears.
4. Verify this is the FTE code category you want to delete.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Attendance Preferences

Use the attendance Preferences page to specify general attendance preferences. Each preference is school- and year-specific. For global preferences at the district level, see *Global Attendance Preferences*.

Use the Quick Lookup Preferences page to specify attendance preferences as they relate to the Quick Lookup page for each student.

For more information about attendance, see *Attendance Overview*.

Enable Enter Attendance Link on Student Pages Menu

To enable the Enter Attendance link to appear in the student pages menu, you must select Meeting or Interval as one of the attendance recording methods and set it as the default attendance recording page. You can use the Enter Attendance link as a shortcut to the Edit Meeting Attendance page or the Edit Interval Attendance page.

How to Specify General Attendance Preferences

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Preferences**. The Attendance Preferences page appears.
3. Use the following table to enter information in the Recording section:

Field	Description
Attendance recording methods	Select the appropriate checkboxes that apply (any combination of the four options is valid): • **Meeting** to record attendance by meeting for this year • **Daily** to record attendance by day for this year • **Time** to record attendance this year by entering a time value • **Interval** to record attendance this year according to a specified time interval **Note:** This setting affects which tabs appear on the Attendance page. For more information, see *Attendance*.
Audit attendance records	Select the checkbox to enable auditing of attendance. After an attendance record is initially created, PowerSchool keeps track of any change, its previous value, and who made the change.
Default attendance page	Use the pop-up menu to indicate the default attendance page to display when viewing student attendance. The items that appear in the pop-up menu vary based on the attendance recording methods you select. **Note:** This setting affects which tab appears as the default tab on the Attendance page. For more information, see *Attendance*.

Enable multiple character attendance codes	By default, you can only create single-character attendance codes. To create multiple-character attendance codes, select the checkbox.
Meeting and daily attendance bridge	When using both Meeting and Daily attendance modes, this setting allows you to synchronize attendance records based on a bridge period. You can define a bridge period in each bell schedule. To create and synchronize Daily attendance records based on the bridge period, select **One-Way**. To keep the corresponding meeting attendance record synchronized whenever a change is made to a daily attendance record, select **Two-Way**. **Note:** It is not necessary to bridge Meeting and Daily attendance. Daily attendance can be managed manually. However, bridging attendance does provide a convenient way of automatically creating and maintaining attendance when both attendance modes are in use. Bridging attendance only functions with sections and section enrollments, which reside in the same school.
Number of school days teachers may alter attendance prior to current date (PowerTeacher)	Use the pop-up menu to indicate how far back teachers can alter attendance in PowerTeacher. The default is set to 14 days. **Note:** This setting does not apply to PowerSchool.
Number of school days teachers may alter attendance after the current date (PowerTeacher)	Use the pop-up menu to indicate how far forward teachers can alter attendance in PowerTeacher. The default is set to 7. **Note:** This setting does not apply to PowerSchool.
Show Saturday and Sunday on attendance views	Select the checkbox to display Saturday and Sunday on attendance views. This is typically not needed unless you have in-session days on weekends where student attendance marks need to be displayed. The following pages will display Saturday and Sunday:

	• PowerSchool admin portal
	    • Student Selection > Enter Attendance
	    • Student Selection > Attendance (Meeting, Daily, Time)
	    • Student Selection > Bell Schedule View
	    • Student Selection > Quick Lookup (Meeting, Daily, Program)
	    • School > Sections > Section > Multi-day Attendance
	    • Teacher Schedules > Teacher > Multi-day Attendance
	• PowerTeacher portal
	    • Section > Multi-day Attendance
	• PowerSchool Student and Parent portal
	    • Grades and Attendance
	    • Attendance History
	    • My Schedule

Start of Week	Indicate the day of the week that you want attendance and the bell schedule to start by choosing **Sunday** or **Monday** from the pop-up menu. The following pages will start with the selected day:
	
	• PowerSchool admin portal
	    • Student Selection > Enter Attendance
	    • Student Selection > Attendance (Meeting, Daily, Time)
	    • Student Selection > Bell Schedule View
	    • Student Selection > Quick Lookup (Meeting, Daily, Program)
	    • School > Sections > Section > Multi-day Attendance
	    • Teacher Schedules > Teacher > Multi-day Attendance
	• PowerTeacher portal
	    • Section > Multi-day Attendance
	• PowerSchool Student and Parent portal
	    • Grades and Attendance
	    • Attendance History
	    • My Schedule

	Note: If the **Show Saturday and Sunday** checkbox is deselected, then the week will start on Monday regardless of the selected day.
Interval Duration (in Minutes)	Interval attendance is primarily intended for alternative education programs that require attendance to be taken every hour. When using Interval Attendance mode, the number of opportunities for which attendance can be recorded during a given class is determined by dividing the bell time for the class by the interval duration. For instance, if a class is 90 minutes long and the interval duration is 60 minutes, then there will be two opportunities provided to take attendance. The first is at the beginning of class and the second is after 60 minutes has gone by. The default for this field is 60 minutes.

4. Use the following table to enter information in the Calculating and Reporting section:

Field	Description
Calculation accuracy	Enter the number of decimal places to use when calculating attendance values.
Count Meeting attendance recorded at another school for students enrolled at this school	If a student is enrolled in a class at another school, and there is attendance associated with that class, select this option to include this attendance when calculating Average Daily Attendance (ADA).
Count these codes for period conversion	This setting determines what is counted and subsequently used as the value for looking up the day's attendance, specifically for Period conversion. Use the pop-up menu to select **Presents** if your school calculates attendance using the number of periods a student is present in a day. Select **Absences** if your school calculates attendance using the number of periods a student is absent in a day.

Round or truncate	Use the pop-up menu to indicate how you want the system to handle long decimals that exceed the maximum when calculating attendance.

5. Use the following table to enter information in the Daily Attendance Calculations section:

Field	Description
Enable ADA Periods and Passing Time Deductions	To enable, see *How to Specify Attendance Preferences* for Daily Time Exclusion. For more information, see the *Daily Time Exclusion*.
Deduct Passing Time	To enable, see *How to Specify Attendance Preferences* for Daily Time Exclusion. For more information, see the *Daily Time Exclusion*.

6. Use the following table to enter information in the Consecutive Absences Notification section:

   Note: No calculations are performed nightly for a school until these settings are submitted.

Field	Description
Enable Notification	Select the checkbox to enable the Consecutive Absences Notification. Once enabled, consecutive absences for in session calendar days are automatically calculated as part of the nightly process. A notification appears on the Attendance pages identifying students who have been absent for an extended period of consecutive day (as indicated by the Notification Threshold). For more information, see *Attendance Data Grid*.
Minimum Days Stored	Enter the minimum number of consecutive (in session calendar) days a student must be absent in order for a record to be generated in the ConsecutiveDaysAlert table. Defaults to **1**.

Maximum Days Stored	Enter the number of in session calendar days earlier than the current system date that will be searched per student for consecutive absences if the Minimum Days Stored value is met. Defaults to **20**.
Notification Threshold	Enter the minimum number of consecutive (in session calendar) days a student must be absent in order to trigger the notification. The value must be between the Minimum Days Stored and Maximum Days Stored values. Defaults to **1**.

7. Click **Submit**. The Changes Recorded page appears.

How to Specify Quick Lookup Preferences

The Quick Lookup page displays absences, tardies, final grades, and citizenship codes for each student in the following areas of PowerSchool:

- Quick Lookup page in PowerSchool and the PowerTeacher portal
- Grades and Attendance page in PowerSchool for Students and Parents
- PowerSchool Mobile

You can choose whether to count attendance for sections that meet multiple times per day as single or multiple instances. For example, if a student misses a class that meets during 2 periods per day, you can specify whether that student's Quick Lookup page displays a 1 or 2 for the number of absences for that class. This setting also affects how the number of absences appears in PowerTeacher Gradebook.

For more information about the Quick Lookup page, see *Student Page Layout*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Quick Lookup Preferences**. The Quick Lookup Preferences page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Store Code	Displays the store code for the final grades, citizenship codes, and any store codes used only for historical grades.

Enabled Parent/Student	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool Student and Parent portal and PowerSchool Mobile. Deselect the checkbox to disable the display of this data.
Enable Teacher	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool Teacher portal. Deselect the checkbox to disable the display of this data.
Enable Admin	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool administrator portal. Deselect the checkbox to disable the display of this data.
Source of Data	Indicate which final grade and citizenship codes you want to display by choosing one of the following from the pop-up menu: • **Gradebook (Current)**: to display the final grade and/or citizenship codes that currently exists in the teacher's PowerTeacher Gradebook. • **Historical (Stored)**: to display the final grade and/or citizenship codes from the student's historical file or after the completion of a grading term. Store Codes that only exist as historical grades will always come from the historical file.

4. Select the **Count Multi-Period Meeting Attendance Once Per Day** checkbox to count only one attendance instance for a class that meets more than once per day. Deselect the checkbox to count attendance for each period.
5. Select the **Show Citizenship Grade** checkbox to display the citizenship grade on the Quick Lookup page. Deselect the checkbox to disable the display.
6. Click **Submit**. The Changes Recorded page appears.

Attendance Indicator

On the PowerTeacher start page, a dot appears next to each class' Chair icon. The color of the dot indicates whether or not the teacher has taken attendance for that class. A clear dot indicates attendance has not been taken. A yellow dot and fraction indicates partial attendance has been taken. A green dot indicates attendance has been taken.

To provide you with flexibility, you can customize the attendance indicator images by replacing them with graphics of your own. You can switch these images as often as you like. For example, you may want to switch your images seasonally by using such images hearts, four-leaf clovers, autumn leaves, or snowmen.

How to Customize the Attendance Indicator

1. Determine the replacement images.
2. Name the replacement images accordingly:
    - For the image that indicates that attendance has not been taken (clear dot), use **attendancetaken_no.png**.
    - For the image that indicates that partial attendance has been taken (yellow dot), use **attendancetaken_some.png**.
    - For the image that indicates that attendance has been taken (green dot), use **attendancetaken_yes.png**.
3. On your PowerSchool Server, navigate to **data > custom > web_root**.
4. Create an **images** folder, if one does not already exist.
5. Open the **images** folder.
6. Copy the replacement images to this folder.

Section Attendance Settings

Use the Section Attendance Settings page to create sections where attendance will be taken every period. These sections are sections created for the sole purpose of taking attendance in a section that meets more than once per day.

For example, if a section of Biology 101 meets during Period 1 for lecture during each day of a two-day cycle and also meets during Period 3 for field study on alternating days, the expression for this section would be 1(A-B) 3(A). If you do not use this option, attendance taken during 3(A) will overwrite attendance taken during 1(A).

For more information about attendance, see *Attendance Overview*.

How to Define Section Attendance Settings

Perform the following procedure to create sections where attendance will be taken every period and either your school has committed a master schedule with sections or sections are created from the School Setup page.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Section Attendance Settings**. The Section Attendance Settings page appears.
3. Use the following table to enter information in the fields:

Field	Description
Course Name	The name of the course appears. Click the course name to display the Edit Course page.
Course Number	The number of the course appears. Click the course number to display the Edit Course page.
Section Number	The number of the section. Click the section number to display the Edit Section page.
Expression	The expression, or period and day combination, for the section appears. Click the expression to display the Edit Section page.
Teacher	The section's teacher appears. Click the teacher's name to display the teacher's current schedule.
Room	The section's room appears. Click the room to display the Edit Section page.
Term	The term abbreviation in which the section is taught appears. Click the term to display the Term page.
Mark	Select the checkbox to take attendance each period separately.

4. Click **Submit**. The Section Attendance Settings: Result page appears.

   Note: To redisplay the Section Attendance Settings: Result page from the School Setup page, click **Section Attendance Settings** and then **Section Attendance Settings: Result**.

Attendance Conversions

Set up attendance conversions to calculate attendance. You can create multiple attendance conversion methods, such as Full Day or Half Day. For example, a student receives only a half-day of attendance credit if he or she is absent for two to four periods and receives no credit if absent for five or more periods. After creating attendance conversions, set up attendance conversion items. For more information, see *Attendance Conversion Items*. For more information about attendance, see *Attendance Overview*.

How to Access the Attendance Conversions Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversions**. The Attendance Conversions page displays the following information:

Field	Description
Attendance Conversion	The name of the attendance conversion
FTE	The name of the Full Time Equivalent (FTE). Students with one FTE can have a different set of conversions than students with a different FTE.
[Attendance Conversion Item]	The types of attendance conversion items you can create, edit, or delete: • **Period** - Use to define the number of periods in which the student must be present/absent to receive the number of points ADA value you define. • **Code** - Use to define the full day ADA value you want a student to receive when a specific attendance code is given. • **Time** - Use to define the cut off points for attendance and the ADA value a student should receive at each. • **Percent Period** - Use to define the percent of periods in which the student must be present/absent to receive the number of points ADA value you define. • **Percent Time** - Use to define the percentage of time for which a student must be present/absent to receive the number of points ADA value you define. **Note:** Period and Time conversions work with daily attendance and partial attendance and can contribute to both full day and partial day ADA values. Whereas, code conversion only works with

	daily attendance and can only contribute to full day and partial day ADA values. One of the following displays for each attendance conversion item entry: • **Defined** – Indicates attendance conversion items have been defined. • **(NONE)** – Indicates no attendance conversion items have been defined. **Note:** Values may vary slightly when Day Part Attendance is not enabled.

How to Add Attendance Conversions

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **New**. The New Attendance Conversion page appears.
4. Enter the name for the attendance conversion.
5. Click **Submit**. The Attendance Conversions page displays the new attendance conversion.

How to Edit Attendance Conversions

You can edit the name of an attendance conversion. To edit conversion items, see *Attendance Conversion Items*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click the name of the attendance conversion you want to edit. The Edit Attendance Conversion page appears.
4. Edit the name of the attendance conversion.

   Note: If the attendance conversion is being used by a bell schedule, links to the bell schedule appear. Click the name of the bell schedule to access the Edit Bell Schedule page. For more information, see *How to Set Up Bell Schedules*. Click the duration of the bell schedule to access the Bell Schedule: [Name] page. For more information, see *How to Set Up Bell Schedule Items*.

5. Click **Submit**. The Attendance Conversions page displays the edited attendance conversion.

How to Delete Attendance Conversions

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click the name of the attendance conversion you want to delete. The Edit Attendance Conversion page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Attendance Conversion Items

PowerSchool uses attendance conversion items to calculate attendance for the purposes of state and provincial reports and student records. There are three types of attendance conversion items you can create for each attendance conversion method: period, code, and time.

Note: Period and Time conversions work with daily attendance and partial attendance and can contribute to both full day and partial day ADA values. Whereas, code conversion only works with daily attendance and can only contribute to full day and partial day ADA values. For more information about code conversion, see the *Attendance User Guide* available on PowerSource.

Period Items

For each period item, define the number of periods in which the student must be present/absent to receive the number of points ADA value you define.

Note: If a bridge period section is not configured within your bell schedule, period items are not counted in the period to day conversion.

How to Add Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** in the Period column next to the conversion item for which you want to add period items. The Period-to-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Periods Present / Periods Absent	Period items can be configured for periods present or absent. Present is used if your school calculates attendance using the number of periods a student is present in a day. Absent is used if your school calculates attendance using the number of periods a student is absent in a day. **Note:** To configure, see the **Count these codes for period conversion** setting in the *Attendance User Guide* available on PowerSource.
Day Attendance Value	If **Period Present**, enter the number of attendance points students receive toward full day ADA if they are present, based on the number of periods in the **Period Present** column. For example, students are counted as absent for the entire day if they are present for zero or one period, enter **0** in the fields next to 0 and 1 periods present. If **Period Absent**, enter the number of attendance points students receive if they are absent, based on the number of periods in the **Period Absent** column.
AM Attendance Value	If **Period Present**, enter the number of attendance points students receive toward partial day ADA for the AM day part if they are present, based on the number of periods in the **Period Present** field. If **Period Absent**, enter the number of attendance points students receive toward partial day ADA for the AM day part if they are absent, based on the number of periods in the **Period Absent** field. **Note:** This field only appears if Day Part Attendance is enabled.

PM Attendance Value	If **Period Present**, enter the number of attendance points students receive toward partial day ADA for the PM day part if they are present, based on the number of periods in the **Period Present** field. If **Period Absent**, enter the number of attendance points students receive toward partial day ADA for the PM day part if they are absent, based on the number of periods in the **Period Absent** field. **Note:** This field only appears if Day Part Attendance is enabled.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit period items. The Period-to-Day Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Period Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Code Items

For each code item, define the ADA value you want a student to receive when a specific attendance code is given.

Note: Code is not applicable if Day Part Attendance is enabled. For more information, see the *State and Provincial Reporting Day Part Attendance Setup Guide* available on PowerSource.

How to Add Code Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** in the Code column next to the conversion item for which you want to add code items. The Code-to-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Attendance Value	For each attendance code, enter the number of attendance points students receive if they are marked with that attendance code.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy code items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Code Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit code items. The Code-to-Day Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Code Items*.
5. Click **Submit**.

6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Time Items

For each time item, define the cut off points for attendance and the ADA value a student should receive at each.

How to Add Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** next to the conversion item for which you want to add time items. The Time-To-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Minutes Present	Enter the minimum number of minutes a student must be present to earn the number of attendance points specified in the next field. Use the first row for zero minutes present. **Note:** Only numeric values containing no decimals may be entered.
Day Attendance Value	Enter the number of attendance points students receive toward the full day ADA value if they are present, based on the number of minutes you enter in the **Minutes Present** field.
AM Attendance Value	Enter the number of attendance points students receive toward the partial day ADA value for the AM day part if they are present, based on the number of minutes in the **Minutes Present** field. **Note:** This field only appears if Day Part Attendance is enabled.
PM Attendance Value	Enter the number of attendance points students receive toward the partial day ADA value for the PM day part if they are present, based on the number of minutes in the **Minutes Present** field.

	Note: This field only appears if Day Part Attendance is enabled.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit time items. The Time Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Time Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Percent Period Items

For each period item, define the percent of periods in which the student must be present/absent to receive the number of points ADA value you define.

Note: If a bridge period section is not configured within your bell schedule, period items are not counted in the period to day conversion.

How to Add Percent Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.

3. Click **(NONE)** in the Percent Period column next to the conversion item for which you want to add percent period items. The Percent-Period-To-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Percent Present	Enter the percentage of periods in a student's schedule that they must be present to earn the number of attendance points specified in the next field. Use the first row for zero percent periods present.
Day Attendance Value	Enter the number of attendance points students receive toward the full day ADA value if they are present, based on the percentage of periods you enter in the **Percent Present** field.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Percent Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit percent period items. The Period-to-Day Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Percent Period Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Percent Time Items

For each time item, define the percentage of time for attendance and the ADA value a student should receive at each.

How to Add Percent Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** next to the conversion item for which you want to add time items. The Percent-Time-To-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Percent Present	Enter the percentage of minutes in a student's schedule that they must be present to earn the number of attendance points specified in the next field. Use the first row for zero percent minutes present.
Day Attendance Value	Enter the number of attendance points students receive toward the full day ADA value if they are present, based on the percentage of minutes you enter in the **Percent Present** field.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Percent Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit percent time items. The Percent Time Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Percent Time Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Attendance Functions

Perform attendance-related functions such as recalculating daily attendance or refreshing attendance data. For more information about attendance, see *Attendance Overview*.

How to Recalculate Daily Attendance

Under certain circumstances, you may need to recalculate the daily attendance minutes. These circumstances may include updating from a previous PowerSchool release or changing the attendance preferences that affects Daily Time Exclusion (DTE). Once this special function is generated, all daily attendance record minutes for each student are updated based on DTE attendance preferences for each school's full year term. For more information, see the *Daily Time Exclusion*.

Note: This special function should be generated after regular business hours, but not during nightly processing. The duration of the special function depends on how many daily attendance and associated Attendance_Time records exist. Run this special function only under the following conditions: no attendance activity is occurring, including recording or importing of attendance records; and no attendance reports are currently running.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Attendance Functions**. The Attendance Functions page appears.
3. Click **Recalculate Daily Attendance Minutes**. The Recalculate Daily Attendance Minutes page appears.
4. Select the checkbox next to each school name for which you want to recalculate attendance minutes.

   Note: The school context is critical in determining which schools appear on this page. When working at the district level, all schools in the district that take daily attendance appear. When working at the school level and the school takes daily attendance, the school appears. When working at the school level and the school does not take daily attendance, the school does not appear.

5. Click **Submit**. The daily attendance minutes are updated.

How to Update Attendance Views

A special function allows you to update the attendance views as needed, rather than wait for the nightly process to execute this same functionality automatically. This update process recalculates and re-populates the Membership Defaults tables based on the date ranges you specify.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Attendance Functions**. The Attendance Functions page appears.
3. Click **Refresh Premier Attendance Views Data**. The Refresh Attendance Views Data Report page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • **The selected students only** to run the report for students in the current selection enrolled in the specified date range. • **All students** to run the report for all students in the current school enrolled in the specified date range.
Begin Date and Ending Date	Specify the date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If no dates or only one date is entered, the special function will run from the first day of the school's term until the current date. Since this process must recalculate attendance values, the greater the date ranges specified, the longer the processing time. **Note:** The date entered must fall within the selected school year term.

Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected **On Specific Date/Time** for **Processing Output**, enter the date to execute the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.

5. Click **Submit**. The refresh process begins. A job file is created showing success and failures for each student processed.

Attendance Synchronization

Districts that switch from using Daily to Meeting attendance or vice versa during the school year will have attendance records that are out of synch. For instance, during the time period that the district took Daily attendance, Meeting attendance records are missing. Use the automated attendance synchronization process to rebuild the missing attendance records.

Processing Options

The synchronization process has two processing options:

- Based on existing Daily attendance records, Meeting attendance records will be created.

- Based on existing Meeting attendance records, Daily attendance records will be created.

Setup

Prior to running the synchronization process, several setup options are required:

- Attendance recording methods – The current method used by the school for recording attendance, as this is the method that will determine the bridge direction (currently taking Daily, so need to retroactively build Meeting OR currently taking Meeting, so need to retroactively build Daily).
- Meeting and Daily Attendance Bridge – Either one-way or two-way sync must be selected:
  - One-way indicates that when a Meeting attendance record is taken during the bridge period, a Daily attendance record is automatically created.
  - Two-way is the same as one-way but also indicates that when a Daily attendance record is taken, a Meeting attendance record is automatically created for the bridge period.
- Bell Schedules – Each bell schedule used in the school's calendar must have a bridge period defined, including default time in and time out.

Other System Requirements

- System Backup – It is strongly recommended that you back up your system prior to running this process.
- School Year – The synchronization process may not be run for school years prior to 2004-2005.
- Current School Only – The synchronization process may only be run for the current school and may not be run for the district office.

For more information about attendance, see *Attendance Overview*.

How to Synchronize Attendance

Note: This procedure may only be performed at the school level.

1. On the start page, choose **System** under Setup in the main menu. The System Administration page appears.
2. Under Attendance, click **Attendance Bridge Synchronization**. The Attendance Bridge Synchronization page appears.
3. Use the following table to enter information in the fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Direction to re-build bridge</td><td>
Choose From Meeting, build Daily to create a daily attendance record for each meeting attendance record that exists for the calendar day's bridge period:

For each Meeting attendance record existing for the bridge period of the calendar day, a Daily attendance record will be created with the attendance code found in the Meeting record.
If a Daily record already exists for the student, either with the same attendance code or a different attendance code, a warning will be displayed. The existing record will not be modified under any circumstance.

Choose From Daily, build Meeting to create a meeting attendance record for each daily attendance record that exists for the calendar day:

For each Daily attendance record existing for the calendar day, a Meeting attendance record will be created for the bridge period with the attendance code found in the daily record.
If a Meeting record already exists for the student in the bridge period, either with the same attendance code or a different attendance code, a warning will be displayed. The existing record will not be modified under any circumstance.
If the attendance code found in the Daily attendance record counts as absent, there is a preference option to mass create a Meeting attendance for every period for the day (not just the bridge period).
When choosing the option to build meeting from daily attendance, meeting attendance records are built as follows:

If the attendance codes denote absence and the preference selected from the Other Preference pop-up menu indicates to mark

</td></tr>
</table>

	all periods, a meeting attendance record will be created for each period in the bell schedule. • If the attendance codes denote absence and the preference selected from the Other Preference pop-up menu indicates to mark only the bridge period, a meeting attendance record will be created for the bridge period identified in the bell schedule. • If the attendance codes denote present or tardy, regardless of the preference to indicate mark all periods or mark only the bridge period, a meeting attendance record will be created for the bridge period in the bell schedule.
Other Preferences	From the pop-up menu, select one of the following options: • **If daily attendance code is absent, mark all periods absent for the day** to create a meeting attendance record for each period in the bell schedule. • **If daily attendance code is absent, mark only the bridge period absent for the day** to create a meeting attendance record for the bridge period identified in the bell schedule.

4. Click **Submit**. The Attendance Bridge Synchronization Progress page appears. When the synchronization is complete, click PowerSchool in the upper-left corner to return to the start page.

   Note: If a Meeting record already exists for the student in the any of these periods, either with the same attendance code or a different attendance code, a warning will appear. The existing record will not be modified under any circumstance.

Teacher Attendance Submission Status

Finding out which teachers have taken attendance has never been easier than using the Teacher Attendance Submission Status page. With graphical green checkmark, orange exclamation mark and red exclamation mark to indicate whether a teacher has completed attendance for the entire day, part of the day, or not at all, staff can quickly determine where follow-up is needed.

Note: This procedure may only be performed at the school level.

How to View Teacher Attendance Submission Status

1. On the start page, choose **Attendance** under Functions in the main menu. The Attendance page appears.
2. Click **Teacher Attendance Submission Status**. The Teacher Attendance Submission Status page appears. By default, attendance submission status appears for today
3. Use the following table to enter information in the fields:

Field	Description
Date Displayed	By default, today's date appears. Enter the date for which you want to view attendance using the format mm/dd/yyyy or mm-dd-yyyy. Alternately, click the **Calendar** icon to select a date. If you enter an invalid date or do not use this format, an alert appears.
Show Sections Excluded From Attendance	By default, the switch is set to **No** to display only sections that are included in ADA calculations. Alternatively, click the switch to **Yes** to display both sections that are and are not included in ADA calculations.
Order By	By default, results appear in alphabetical order. Do one of the following: • Select the **Alphabetic** option to order attendance results by teacher's last names (red, orange, and green). • Select the **Att taken first** to order attendance results by teachers who have completed taking attendance (green), teachers who are in the progress of taking attendance (orange), and teachers who have not yet begun taking attendance (red). • Select **No Att taken first** to order attendance results by teachers who have not yet begun taking attendance (red), teachers who are in the progress of taking attendance

	(orange), and teachers who have completed taking attendance (green).
Show	By default, attendance for all teachers for the selected school appears. Do one of the following: • Select the **All** option to view all statuses of teacher attendance submission. • Select the **Complete Attendance** option to only view teachers who have completed taking attendance (green). • Select the **Incomplete Attendance** option to only view teachers who are in the progress of taking attendance (orange) or who have not yet begun taking attendance (red).

4. Click **Submit**. The Teacher Attendance Submission Status page refreshes and displays results based on your selections.

   Note: If you selected a date that school was not in session, an alert appears stating "No attendance data for this date."

5. To view class information, click teacher's name. The Submission Status pop-up appears displaying the teacher's name, the classes the teacher is teaching for the selected day, and whether they have taken attendance for each class.
6. When done viewing class information, click **Ok**. The Submission Status pop-up closes.

Take Attendance

Meeting/Interval Attendance

In PowerSchool, your school can track meeting attendance, interval attendance, daily attendance, and time attendance. Students' meeting and interval attendance records indicate their absences and tardies in each class period during the school day. Interval attendance allows for multiple attendance records per period. Students' daily attendance records indicate their absences, tardies, and arrival and dismissal times for an entire school day. Time attendance is a simple way of adding attendance value by entering total minutes or hours for a given day.

Use the Meeting/Interval Attendance function to view or change a student's attendance record. Each column represents one week, with the days of the week MTWTF) underlined. Attendance codes are noted in the chart under each day. In the case of meeting attendance, the days without a code indicate that the student was present. With interval attendance, all days and periods must have a code.

Meeting and interval attendance functions share the same page. The primary difference between the two is that meeting allows for only one attendance record per period while interval attendance allows for multiple attendance records per period based on the specified interval. Whether the class is meeting, or interval is determined by what is specified for the section in the *Section Setup* page. Interval attendance may not appear any different from meeting attendance if the period length is less than or equal to the specified interval duration defined in *Attendance Preferences*. For more information about attendance, see *Attendance Overview*.

Enable Enter Attendance Link on Student Pages Menu

A shortcut to the Edit Meeting/Interval Attendance page is available via the Enter Attendance link, which appears just below the Attendance link. To enable the Enter Attendance link to appear in the student pages menu, **Meeting** or **Interval** must be selected as one of the attendance recording methods and set as the default attendance recording page on the *Attendance Preferences* page.

How to Take Meeting or Interval Attendance for a Single Day/Period

Use this procedure to take Meeting or Interval attendance for the selected student. You can mark or change a single attendance instance in a selected week.

Note: Any change recorded for meeting attendance modifies daily attendance if daily attendance is enabled and the period associated with the meeting attendance being modified is the bridge period for that day. Interval attendance never modifies daily attendance.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page appears, based on the Default Attendance Recording Page setting on the Attendance Preferences page.

   Note: To go directly to the Edit Meeting/Interval Attendance page, click **Enter Attendance** instead of **Attendance**. The Edit Meeting/Interval Attendance page appears. To continue, skip to Step 6.

3. If the Meeting/Interval Attendance page does not display by default, click **Meeting/Interval**. The Meeting/Interval Attendance page appears.

   Note: A dash (-) indicates that school is not in session and/or the student is not enrolled on that date.

4. Click **Show dropped classes also** to view or change attendance records for dropped classes. The dropped classes appear on the page with the other classes.
5. Click the week link in a week that you want to enter or change attendance. The Edit Meeting/Interval Attendance page appears.

   Note: The Submit button is unavailable until Step 7 is performed.

6. Use the following table to enter information in the fields:

Field	Description
Current attendance code	Choose the attendance code you want to enter.
Set All	Click to enter the selected attendance code in all periods and/or intervals fields for a given day.
[Attendance]	Click to enter the selected attendance code in a specific period and/or interval field.

[Comment Icon]	When an attendance code (other than blank) is entered, a gray Comment icon appears. To enter an attendance comment: 1. Click the **Comment** icon. The Edit Comments pop-up appears. 2. Enter a comment for the student's attendance record. 3. Click **OK**. The Comment icon now appears blue to indicate a comment has been entered.

7. Click **Submit**. The Changes Recorded page appears.

How to Take Meeting Attendance for an Extended Day/Period

Note: This function does not function with interval attendance.

Use this procedure to take meeting attendance for the select student. You can mark or change a student's attendance records for blocks of time. This is particularly useful when the student has been or will be out for an extended period. To change a student's attendance record for an extended period, it is easiest to use this method.

Note: Any change recorded for meeting attendance modifies daily attendance if the following conditions are met: daily attendance is enabled, and the period associated with the meeting attendance being modified is the bridge period for that day.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page appears, based on the Default Attendance Recording Page setting on the Attendance Preferences page.

   Note: To go directly to the Edit Meeting Attendance page, click **Enter Attendance** instead of Attendance. The Edit Meeting Attendance page appears. To continue, skip to Step 6.

3. If the Meeting Attendance page does not display by default, click **Meeting**. The Meeting Attendance page appears.

   Note: A dash (-) indicates that school is not in session and/or the student is not enrolled on that date.

4. Click **Show dropped classes also** to view or change attendance records for dropped classes. The dropped classes appear on the page with the other classes.
5. Click **Change Meeting Attendance**. The Change Meeting Attendance page appears.
6. Use the following table to enter information in the fields:

Field	Description
Change attendance for	The selected students appear.
From this date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Meetings to scan	Select the checkboxes to indicate the periods to change. To mark attendance for the entire day, click **Select All**.
Codes to scan for	Either choose all by clicking **All** or select **These Codes** and then choose the attendance codes for which you want to scan
Attendance code to set	Choose the attendance code to apply to the date range from the pop-up menu.
If other than a default present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record.

7. Click **Submit**. The Changes Recorded page appears.

Daily Attendance

In PowerSchool, your school can track both meeting and daily attendance. Students' meeting attendance records indicate their absences and tardies in each class period during the school day. Students' daily attendance records indicate their absences, tardies, and arrival and dismissal times for an entire school day.

Use the Daily Attendance function to view or change a student's attendance record. Each column represents one week, with the days of the week (MTWTF) underlined. Attendance codes are noted in the chart under each day. On the days where there is no code, the student was present.

For more information about attendance, see *Attendance Overview*.

How to Take Daily Attendance for an Individual Student

Schools use the Daily Attendance function to select a single period to denote a student's daily attendance. By denoting the period, default times for check-in, checkout, and return-in can be defined for a daily attendance total. Attendance can be entered from the classroom using PowerTeacher. Once the teacher enters the attendance, the office staff can then take control of a student's daily attendance. The office also can use a variety of options and reports when working with the Daily Attendance function.

With a period marked for daily attendance, the teacher automatically sets the daily attendance while taking attendance in the classroom using PowerTeacher. Your PowerSchool administrator sets the defaults for the time in and time out. This lets teachers not only track classroom attendance, but also set the initial code for the office.

After you add a daily attendance entry, you can modify daily attendance. Click the abbreviation for the first day above each day of the week in the current term. Click the letter to display the Daily Attendance page for the date to be modified.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.
3. Click **Daily**. The Daily Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click the link in a week where you want to enter attendance codes. The New Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Date	The date for which you are taking attendance appears.
Attendance Code	Choose the attendance code from the pop-up menu.
Total Time	Based on the times entered, PowerSchool calculates the minutes the student has attended for the day. The results display after you click **Submit**.
Comment	Enter any additional text, if applicable.
Time In	Enter the time the student arrives, if applicable.
Time Out	Enter the time the student leaves, if applicable.
Exclude from Total Time Calculation	Select the checkbox to exclude this time item from the total time calculation.
Time Comment	Enter any additional text regarding the time the student arrived or left, if applicable.

6. Click **Submit**. The Changes Recorded page appears.

   Note: A clock icon, total minutes, attendance code, and time in and time out appear in the date for which you just took attendance.

How to Take Daily Attendance for Multiple Days for an Individual Student

In addition to changing a single date for an individual student, you can change multiple dates at one time.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.

3. Click **Daily**. The Daily Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click **Change Multiple Days** at the top of the Daily Attendance page. The Change Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Change Daily Attendance for	The selected student appears.
From this Date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this Date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Codes to scan for	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the attendance codes you want to scan.
Attendance Code to Set	Choose the attendance code to apply to the date range from the pop-up menu.
If Other Than a Default Present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record, if applicable.

6. Click **Submit**. The Changes Recorded page appears.

   Note: A clock icon, total minutes, attendance code, and time in and time out appear in the date for which you just took attendance.

How to Edit Daily Attendance

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.
3. Click **Daily**. The Daily Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click the link in a week where you want to change attendance codes. The Edit Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Date	The date for which you are taking attendance appears.
Attendance Code	Choose the attendance code from the pop-up menu.
Total Time	Based on the times entered, PowerSchool calculates the minutes the student has attended for the day. The results display after you click **Submit**.
Comment	Enter any additional text.
Time In	The time the student arrives appears.
Time Out	The time the student leaves appears.

Minutes	Based on the times entered, the minutes the student has attended for each class appears, as well as the total minutes the student has attended for the day.
Comment	Any additional text regarding the time the student arrived or left appears.
Exclude from Total Time Calculation	Indicates whether or not this time item is excluded from the total time calculation.

6. Click **Submit**. The Changes Recorded page appears.

   Note: A clock icon, total minutes, attendance code, and time in and time out appear in the date for which you just took attendance.

Record Meeting Attendance by Section

Using the Record Meeting Attendance [Section] page, you can enter or change the attendance records for students in a section.

How to Record Meeting Attendance by Section for a Date Range

Once an attendance record has been entered or modified by a PowerSchool administrator, it cannot be modified by the teacher in PowerTeacher.

1. To access the Record Meeting Attendance [Section] page, do one of the following:
   - Access the Sections page. For more information, see *Sections*.
   - Access the Teacher Schedule page. For more information, see *Staff Current Schedules*.
2. Click the **Attendance** (grid) icon next to the class for which you want to record attendance.
3. Use the following table to enter information in the fields:

Field	**Description**
Attendance Code	Select the attendance code from the pop-up menu.

	Note: To enter attendance all students using the day of the week buttons, an attendance code other than blank (Present) must be selected.
Date Range	1. Click **Edit**. The Update Date Range pop-up appears. 2. Do one of the following: • Select **Range**, enter the date range for which you want to enter attendance, or click the **Calenda**r icon to select a date. • Select **Reporting Term** to choose the term from the pop-up menu. 3. Click **Update** to change the attendance date.
Comments	Do one of the following: • Click **Display** to show teacher comments in the attendance grid. • Click **Hide** to not show teacher comments in the attendance grid.

4. To enter an attendance code for all students, click the day of the week (S, M, T, W, T, F, S) for which you want to enter the attendance code.

   Note: Attendance codes that have already been entered are not overwritten. However, if the attendance code is a blank (Present), it will be overwritten.

5. Use one of the following methods to enter the applicable attendance code:
   - Click in the field next to the student's name to enter the attendance code you selected from the **Attendance Code** pop-up menu. Use the pop-up menu to select a different attendance code, if needed.
   - Double-click in a field and select the code from the pop-up menu. Use the arrow keys on your keyboard to scroll through the list.
   - Click in a field and type the attendance code directly in the field.

   Note: Use the Tab or arrow keys to navigate to a different field.

6. When an attendance code is entered, a comment icon appears. Click the icon to enter an attendance comment on the Edit Comments pop-up. Click **OK** to enter the comment for the student's attendance record.

7. Click on an icon in the **Alert** column to view the applicable alert pop-up.
8. When finished entering attendance and comments, click **Submit**.

How to Record Meeting Attendance by Section for a Specific Date

Recording meeting attendance by section for a specific date is the same in PowerSchool as when entering single day attendance in PowerTeacher. Once an attendance record has been entered or modified by a PowerSchool administrator, it cannot be modified by the teacher in PowerTeacher.

Note: By submitting attendance on this page you are verifying that attendance has been taken for this entire class.

1. To access the Record Meeting Attendance [Section] page, do one of the following:
   - Access the Sections page. For more information, see *Sections*.
   - Access the Teacher Schedule page. For more information, see *Staff Current Schedules*.
2. Click the **Attendance** (chair) icon.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Code	Select the attendance code from the pop-up menu. **Note:** Blank attendance codes count as (Present). However, if using interval attendance, an attendance value may be required to be entered for each student based on the requirements for your state/province. **Note**: If entering interval attendance, the interval for the selected period appears at the top of the **Attendance** column.
Date	Select the date or period for which you want to enter attendance from the pop-up menu. **Note**: If entering interval attendance, the interval for the selected period appears at the top of the **Attendance** column.
Classes	If there is more than one section of this class, you can click **Show Multiple Sections** to combine the students from multiple sections of this class into one attendance view. Click **Show Single Section** to return to a single section view. For more information,

	see *How to Record Meeting Attendance for Multiple Sections for a Specific Date*.

4. Use one of the following methods to enter the applicable attendance code:
    - Click in the field next to the student's name to enter the attendance code you selected from the **Attendance Code** pop-up menu. Use the pop-up menu to select a different attendance code, if needed.
    - Double-click in a field and select the code from the pop-up menu. Use the arrow keys on your keyboard to scroll through the list.
    - Click in a field and type the attendance code directly in the field.

    Note: Use the Tab or arrow keys to navigate to a different field.

5. When an attendance code is entered, a comment icon appears. Click the icon to enter an attendance comment on the Edit Comments pop-up. Click **OK** to enter the comment for the student's attendance record.
6. Click on an icon in the **Alert** column to view the applicable alert pop-up.
7. When finished entering attendance and comments, click **Submit**.

How to Record Meeting Attendance for Multiple Sections for a Specific Date

Recording meeting attendance for multiple sections for a specific date is the same in PowerSchool as when recording attendance for multiple sections in PowerTeacher. Once an attendance record has been entered or modified by a PowerSchool administrator, it cannot be modified by the teacher in PowerTeacher.

Note: By submitting attendance on this page you are verifying that attendance has been taken for this entire class.

1. To access the Record Meeting Attendance [Section] page, do one of the following:
    - Access the Sections page. For more information, see *Sections*.
    - Access the Teacher Schedule page. For more information, see *Staff Current Schedules*.
2. Click the **Attendance** (chair) icon.
3. Click **Show Multiple Sections**. In Single Day attendance mode, the names of those sections that meet concurrently appear, along with a combined class roster. In Multi-Day attendance mode, the names of those sections that meet concurrently appear, and the students display by section.

    Note: Concurrent attendance can only be taken for sections that share the same attendance mode as the originally selected section. For instance, if the selected section is designated as an interval attendance mode, only sections that are designated as using interval attendance will be combined when **Show Multiple Sections** is selected.

4. Enter the attendance code using the data entry options for the selected page.

   Note: Blank attendance codes count as (Present). However, if using interval attendance, an attendance value may be required to be entered for each student based on the requirements for your state/province.

5. Repeat for each different attendance code to assign.
6. Click **Submit**. The attendance codes are saved to the PowerSchool system.

Time Attendance

In PowerSchool, your school can track meeting attendance, interval attendance, daily attendance and time attendance. Students' meeting and interval attendance records indicate their absences and tardies in each class period during the school day. Interval attendance allows for multiple attendance records per period. Students' daily attendance records indicate their absences, tardies, and arrival and dismissal times for an entire school day.

Time attendance is a simple way of adding attendance value by entering total minutes or hours for a given day. It is often used to enter work experience hours off of a timecard from a student's vocational job or for entering independent study hours.

Use the Time Attendance function to view or change a student's time attendance record. Each column represents one week, with the days of the week (MTWTF). Attendance minutes are noted in the chart under each day.

For more information about attendance, see *Attendance Overview*.

How to Take Time Attendance

After you add a time attendance entry, you can modify the entry by clicking the minutes in the appropriate day column. Multiple time attendance entries can be made for a single day by clicking the day abbreviation. Each time the day abbreviation is clicked a new entry is displayed to be filled out. Time entries cannot be deleted but they can be given a zero-minute (or hour) amount that effectively voids them.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Attendance** from the student pages menu. The attendance pages appear. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.
3. Click **Time**. The Time Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click the day abbreviation in a week where you want to enter or change attendance. The New Time Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Date	The date for which you are taking attendance appears (read-only).
Attendance Code	Choose the attendance code from the pop-up menu.
Time	Enter the total amount of attendance time for this record. The value can either be entered in minutes or hours.
Minutes/Hours	Let the system know whether the time value entered is in minutes or hours. The default is minutes. If the time value entered is in hours then select hours from the pop-up menu. The system will convert the value to minutes when it is stored. Hours are not stored with the record.
Program	If these hours are associated to a special program that the student is enrolled in then specify that there. For example, California's Alternative Education program for Continuation Education requires that attendance is tracked for the program. The valid values are any of the special programs that the student is currently enrolled in.
Work Experience	This is primarily targeted for use for California Continuation Education, which requires that the attendance hours related to work time are tracked.

Comment	Enter any additional text regarding this record.

6. Click **Submit**. The Changes Recorded page appears.

Group Attendance

Change the attendance records either for one date range, day, or period for a selected group of students. In addition, you can change the attendance records either retroactively or in advance using either Meeting or Daily attendance. Meeting attendance is taken each time a class meets, whereas Daily attendance is taken for an entire school day. For more information about attendance, see *Attendance Overview*.

How to Change Group Attendance (Meeting)

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Attendance Change**. The Change Meeting Attendance page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Change attendance for	The selected students appear.
From this date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

To this date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Meetings to scan	Select the checkboxes to indicate the periods to change. To mark attendance for the entire day, click **Select All**.
Codes to scan for	Either choose all by selecting **All** or select **These Codes** and then choose the attendance codes for which you want to scan.
Attendance code to set	Choose the attendance code to apply to the date range from the pop-up menu.
If other than a default present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record.

5. Click **Submit**. The PowerSchool start page appears. To verify that you entered the correct codes, search for and select one of the students in the group. Then, view the student's Attendance page.

How to Change Group Attendance (Daily)

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Attendance Change**. The Change Meeting Attendance page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Daily**. The Change Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Change attendance for	The selected students appear.
From this date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Codes to scan for	Either choose all by selecting **All** or select **These Codes** and then choose the attendance codes for which you want to scan
Attendance code to set	Choose the attendance code to apply to the date range from the pop-up menu.
If other than a default present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record.

6. Click **Submit**. The PowerSchool start page appears. To verify that you entered the correct codes, search for and select one of the students in the group. Then, view the student's Attendance page.

Reports

Before producing attendance reports, you are encouraged to ask your PowerSchool administrator how your school calculates attendance. For example, does your school report how many days students are present or how many days they are absent?

Access Attendance Reports

While you can run all attendance reports for individual students, you can also run many for a selected group of students. If an attendance report allows group reporting, select that group of students before running the report. If you select a group of students from the start page, the Group Functions page appears either immediately or after selecting students from the Student Selection page.

Note: For detailed information about a specific report, see the Attendance section of the *Reports User Guide* on PowerSource.

How to Access Attendance Reports

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, the following attendance reports appear:

Field	Description
Absentee	Click to view single day period-by-period attendance code report. For more information, see *Absentee Report*.
Attendance Count	Click to view multi-day period-by-period attendance code report. For more information, see *Attendance Count Report*.
Class Attendance Audit	Click to view section specific attendance roster. For more information, see *Class Attendance Audit*.
Consecutive Absences	Click to view report detailing consecutive student absences by absence code. For more information, see *Consecutive Absences Report*.

Student Attendance Audit	Click to view roster report detailing attendance codes by day. For more information, see *Student Attendance Audit*.
Monthly Student Attendance Report	Click to view twenty-day student attendance report by grade. For more information, see *Monthly Student Attendance Report*.
Attendance Summary by Grade	Click to view an aggregated attendance report for a date range and grade(s). For more information, see *Attendance Summary by Grade Report*.
Year-to-Date Attendance Summary	Click to view a year-to-date aggregated attendance report by grade. For more information, see *Year-to-Date Attendance Summary*.
PowerTeacher Attendance	Click to view report showing which teachers have not taken attendance. For more information, see *PowerTeacher Attendance Report*.
Weekly Attendance Summary (Meeting)	Click to view a weekly attendance summary by section. For more information, see *Weekly Attendance Summary (Meeting)*.
Weekly Attendance Summary (Daily)	Click to view a weekly attendance summary by Teacher. For more information, see *Weekly Attendance Summary (Daily)*.
Period Att. Verification	Click to view report showing students marked present a specified number of periods. For more information, see *Period Attendance Verification Report.*

Note: To search for students with perfect attendance, see *Advanced Search and Select*.

Attendance Data Grid

The Attendance Data Grid is the central point from which you can quickly and easily view attendance information. The Attendance Data Grid is comprised of four tabs: Reports, Daily, Meeting, and Consecutive Absences.

Note: If the Consecutive Absences Notification is enabled, a message may appear indicating there are students who have been absent for an extended period of consecutive (in session calendar) days. For detailed information, see *Consecutive Absences* in this section. For information about enabling this feature, see *Consecutive Absences* in the Attendance Preferences section.

Setup

Prior to using the Attendance Data Grid, you can configure what tabs appear on this page by using the **Attendance recording methods** setting and which tab appears as the default tab using the **Default attendance page** setting. For more information, see *Attendance Preferences*.

Note: The tabbed information is only available at the school level. If accessed at the district level, only the reports content appears.

Localization

Information on the Attendance Data Grid can be localized. To localize the Absent attendance category, use the Localize page button that appears on the navigation bar. For more information, see *Localize Individual Pages*. To localize other attendance categories and attendance codes, use the **Data** tab on the Localize PowerSchool page. For more information, see *Localize PowerSchool*.

Reports

Using the Reports tab, you can access the most commonly used attendance reports.

How to Access Attendance Reports

1. On the start page, choose **Attendance** under Functions in the main menu. The Attendance page appears.
2. Click the **Reports** tab, if needed. On the Reports tab, the following attendance reports appear:

Note: Your tab selection is retained and available each time you navigate back to the Attendance page.

Field	Description
Absentee Report	Click to view a report detailing single-day period-by-period attendance code information. For more information, see *Absentee Report*.
Attendance Count	Click to view a report detailing multi-day period-by-period attendance code information. For more information, see *Attendance Count Report*.
Consecutive Absences	Click to view a report detailing consecutive student absences by absence code. For more information, see *Consecutive Absences Report*.
PowerTeacher Attendance	Click to view a report detailing which teachers have not taken attendance. For more information, see *PowerTeacher Attendance Report*.
Search By Grades/Attendance	Click to search for a group of students based on their grades or attendance. For more information, see *Search By Grades/Attendance*.
Teacher Attendance Submission Status	Click to view a graphical report detailing which teachers have not taken attendance. For more information, see *Teacher Attendance Submission Status*.

Daily Attendance

Using the Daily tab, you can quickly and easily view daily attendance information for a selected school for the current or selected day.

How to View the Daily Attendance

1. On the start page, choose **Attendance** under Functions in the main menu. The Attendance page appears.

2. Click the **Daily** tab, if needed. By default, information appears for today's date.
3. To select a different date, click the **Calendar** icon and select a date. The page displays information for the selected date.

   Note: Your tab selection is retained and available each time you navigate back to the Attendance page.

   The following information appears in the Student Counts section:

   Note: Up to four attendance categories may appear. Attendance categories appear from highest to lowest count.

Field	Description
Absent	By default, the total number of students with absences appears on the first tile. Click the tile to remove the filter and view all attendance codes in the grid. Click again to filter by absent codes.
[Attendance Category]	Total count for the indicated attendance category. Click the tile to switch to this filter. Click again to remove this filter.
Filter	Click the arrow to expand this section. Click the arrow again to collapse this section. The first row of the filter displays information based on the selected tile. To further narrow the list of students: 1. Enter search criteria in the **Search** field. 2. Do one of the following: • Select the **Use Current Selection** checkbox to view daily attendance information for only students in the current student selection. • Leave the checkbox blank to view daily attendance information for all students in the selected school. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **Attendance Code** • **Grade Level**

	• **Home Phone** • **Name** 3. Enter search criteria in the search field. **Note:** Only one value may be entered. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. To add another filter: 1. Click **+**. 2. Repeat Step 1 through Step 5. **Note:** The + appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

4. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	**Description**
Name	The student's last, first name. Click to view the Daily Attendance page. For more information, see *Daily Attendance*.
Grade Level	The student's grade level.

<table>
<tr><td>Home Phone</td><td>The student's home phone number.</td></tr>
<tr><td>Attendance Code</td><td>The attendance code the student received for today.</td></tr>
<tr><td>[Pagination]</td><td>Use to navigate the search results.</td></tr>
<tr><td>Rows/Page</td><td>By default, ten records display per page. To view more records per page, enter the appropriate number in the field.</td></tr>
<tr><td>Set Current Selection</td><td>To make the filtered list of students your current student selection, do one of the following:
Select the checkbox in the header row to select all students. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students.
Select the checkbox for each student you want to work with.
Click Set Current Selection. A confirmation message appears.
Note: If the checkbox in the header row is selected, all records for the currently applied filters will be selected. The student selection set is retained until you set another current selection.</td></tr>
<tr><td>Download</td><td>To download the attendance information, click the arrow and select one of the following from the pop-up menu:
Comma-Separated Value (CSV)
Excel Spreadsheet (XLSX)
Portable Document Format (PDF)
Note: A checkmark appears next to your selection.
Note: The PDF format is restricted to a maximum of 1000 records.
Note: Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format.</td></tr>
</table>

	Note: If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language.

Meeting Attendance

Using the Meeting tab, you can quickly and easily view meeting attendance information for a selected school for the current or selected day.

How to View the Meeting Attendance

1. On the start page, choose **Attendance** under Functions in the main menu. The Attendance page appears.
2. Click the **Meeting** tab, if needed. By default, information appears for today's date.
3. To select a different date, click the **Calendar** icon and select a date. The page displays information for the selected date.

   Note: Your tab selection is retained and available each time you navigate back to the Attendance page.

   The following information appears in the Student Counts section:

   Note: Up to four attendance categories may appear. Attendance categories appear from highest to lowest count.

Field	**Description**
Absent	By default, the total number of students with absences appears on the first tile. Click the tile to remove the filter and view all attendance codes in the grid. Click again to filter by absent codes.
[Attendance Category]	Total count for the indicated attendance category. Click the tile to switch to this filter. Click again to remove this filter.
Attendance Submission Status	The percentage of section meetings for which attendance has been submitted. Indicate which sections you want included in the percentage: • **ADA Sections** (default)

	• **All Sections** **Note:** ADA section are sections that count towards Average Daily Attendance (the total number of days of student attendance divided by the number of days of school taught during the same period). Click **Incomplete** to view a list of teachers and their section meetings for which attendance has not been completed. For more information, see *Teacher Attendance Submission Status*. Click **Complete** to view a list of teachers and their section meetings for which attendance has been completed. For more information, see *Teacher Attendance Submission Status*.
Filter	Click the arrow to expand this section. Click the arrow again to collapse this section. The first row of the filter displays information based on the selected tile. To further narrow the list of students: 1. Enter search criteria in the **Search** field. 2. Do one of the following: • Select the **Use Current Selection** checkbox to view daily attendance information for only students in the current student selection. • Leave the checkbox blank to view daily attendance information for all students in the selected school. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **Grade Level** • **Home Phone** • **Name** • **[Meeting]** 3. Enter search criteria in the search field. **Note:** Only one value may be entered.

	4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. To add another filter: 1. Click **+.** 2. Repeat Step 1 through Step 4. **Note:** The **+** appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

4. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	**Description**
Name	The student's last, first name. Click to view detailed information. For more information, see *Meeting/Interval Attendance*.
Grade Level	The student's grade level.
Home Phone	The student's home phone number.
[Meetings]	The attendance code the student received for the meeting. **Note:** Meetings display based on calendar setup. For more information, see *Calendar Setup*.

<table>
<tr><td>[Pagination]</td><td>Use to navigate the search results.</td></tr>
<tr><td>Rows/Page</td><td>By default, ten records display per page. To view more records per page, enter the appropriate number in the field.</td></tr>
<tr><td>Set Current Selection</td><td>To make the filtered list of students your current student selection, do one of the following:
Select the checkbox in the header row to select all students. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students.
Select the checkbox for each student you want to work with.
Click Set Current Selection. A confirmation message appears.
Note: If the checkbox in the header row is selected, all records for the currently applied filters will be selected. The student selection set is retained until you set another current selection.</td></tr>
<tr><td>Download</td><td>To download the attendance information, click the arrow and select one of the following from the pop-up menu:
Comma-Separated Value (CSV)
Excel Spreadsheet (XLSX)
Portable Document Format (PDF)
Note: A checkmark appears next to your selection.
Note: The PDF format is restricted to a maximum of 1000 records.
Note: Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format.
Note: If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language.</td></tr>
</table>

Consecutive Absences

Using the Consecutive Absences tab, you can quickly and easily view a list of students who have been absent for an extended period of consecutive (in session calendar) days.

How to View the Consecutive Absences

1. On the start page, choose **Attendance** under Functions in the main menu. The Attendance page appears.
2. Click the **Consecutive Absences** tab, if needed. The Consecutive Absences tab appears.

   Note: A message appears if no students have an extended period of consecutive absences or the Consecutive Absences Notification feature has been disabled. For information about enabling this feature, see *Consecutive Absences* in the Attendance Preferences section.

   Note: Your tab selection is retained and available each time you navigate back to the Attendance page.

Field	Description
Basic Filter	To filter the information that appears on this page, enter search criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **Students** • **Consecutive Absences** 3. Enter filter criteria in the field to the right of the pop-up menu. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. To add another filter: 1. Click **+**. 2. Repeat Step 1 through Step 4.

	Note: The + appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

3. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	**Description**
Student	The student's last, first name. Click to access the student's Attendance page. For more information, see *Meeting/Interval Attendance*, *Daily Attendance*, or *Time Attendance*.
Consecutive Absences	The student's grade level.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.
Set Current Selection	Click to make the filtered list of students your current student selection. A confirmation message appears.

How to Recalculate Consecutive Absences Notification

The Recalculate Consecutive Absences Notification operation automatically runs as part of the nightly process. In addition, you can run the operation manually to generate a report on consecutive absences.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. Use the following table to enter information in the fields:

Field	Description
Operation	Choose **Recalculate Consecutive Absences Notification** from the pop-up menu.
Param 1	This field is optional. If no date is entered, the operation runs for today's date. If a specified date is entered, the operation runs for that date.

4. Click **Submit**. The system completes the special operation.

Backfill Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Backfill is a process that specifically supports the California's Alternative Education Program for Continuation Education. For more information about California's Alternative Education Program (CA AEP), visit PowerSource.

Backfilling maximizes the number of attendance hours that can be claimed for state funding by taking excess hours from a school week and applying those hours to a prior week in which the maximum hours were not achieved. There is a set number of hours per week that can be used towards ADA funding. Once this maximum is reached the state allows any additional hours to be used in previous weeks in which a student did not attend for the maximum. Hours can only be backfilled to previous weeks. Hours cannot be used for future weeks. There are numerous rules regarding backfilling and how hours can be claimed.

Backfill can be applied when attendance is taken by enabling Realtime Backfill. Backfill can also run as a separate process using Backfill Management. For more information, see *Manage Backfill*.

Setup Backfill

Before you can begin using backfilling, you must perform the following setup items:

- Enable Backfill
- Configure Backfill Preferences

Enable Backfill Management

By default, Backfill is not enabled. Once Backfill is enabled, Backfill functionality appears throughout PowerSchool, including:

- Access to the Backfill Management page.
- Certain aggregation necessary to support backfill will occur whenever attendance is recorded in the system
- Three additional attendance categories, Unexcused Absences, Excused Absences, and Suspensions will be created, if they are not already existing, that are necessary to support backfill reports.

How to Enable Backfill Management

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Backfill Preferences**. The Attendance Backfill Preferences page appears.
3. Select the **CA Continuation School Backfill Enabled** checkbox to enable Backfill Management.
4. Specify backfill preferences. For field descriptions, see *Configure Backfill Preferences*.
5. Click **Submit**. The Changes Recorded page appears.

Configure Backfill Preferences

Once you have enabled Backfill, you can then configure backfill preferences to indicate how you want backfilling to be processed.

How to Specify Backfill Preferences

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Backfill Preferences**. The Attendance Backfill Preferences page appears.

3. Use the following table to enter information in the Reporting section:

Field	Description
Realtime Backfill Enabled	Enabling Realtime Backfill results in backfill being applied whenever attendance is recorded in the system. Each time attendance and submitted for a student the system will determine if the maximum number of course attendance hours that can be claimed for funding has been exceeded. If there are excess hours the system will determine whether any prior weeks did not reach the maximum hours and the excess hours will be applied to those prior short weeks. Realtime backfill may result in a slight degradation of performance when taking attendance. The alternative to enabling Realtime Backfill is to run a separate backfill process on a regular basis. Enabling Realtime Backfill can save time and extra steps when it comes time to report ADA. Select the checkbox to enable Realtime Backfill. Alternatively, deselect the checkbox to disable Realtime Backfill.
Program to Backfill	Continuation Education students must be enrolled into the Continuation Education program. For more information, see *Schools*. The system determines who is eligible for backfill according to those students who are enrolled in the program identified here. Additionally, the system determines which sections are eligible for backfill according to which sections are assigned to the Continuation Education program. For more information, see *Sections*. Choose the program defined for "Continuation Education" you want to backfill from the pop-up menu.
Target Hours per Day in Week	The system must know the maximum number of hours per week that can be claimed toward ADA funding. The number of hours is based on a five day in-session school week and is currently 15 hours. The maximum hours are proportional to the number of in-session school days for the week, which results in three hours per day. By default, this field is set to three hours. If you need to change this value, enter the new value in this field.

Maximum Work Experience Hours per Day in Week	California rules for eligible ADA hours state that only ten hours of work experience can be claimed toward funding in a given five-day school week. This breaks down into two hours per day thus a week with only three in-session days can only claim six work experience hours towards ADA. The system takes this into account when performing backfill as well as during the reporting of ADA for continuation education. By default, this field is set to two hours. If you need to change this value, enter the new value in this field.
Backfill Start Date	This field is used to let the system know how far back it should look when investigating for weeks that need backfill hours to achieve the maximum that can be claimed for ADA. This date should be changed whenever reports are produced, especially auditing reports or P1, P2 and P3 reports for the state, so that the backfill process does not change attendance for weeks that have already been reported. By default, this field is set to the beginning of the school year. If you need to change this value, enter the beginning date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. **Note:** It is recommended that the backfill start date be set to the beginning of each reporting period, ensuring that the backfill start date is synchronized with the actual reporting periods.
Backfill End Date	This field is used to let the system know the date on which backfill will no longer be applied. Using a date prior to the current system date effectively disables backfill for any attendance taken after the end date. Typically, this field is left blank to indicate the current date or is set to the end of the school year. Enter the ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. Otherwise, leave blank to indicate today's date. **Note:** If entering a backfill end date, it is recommended that the backfill end date be set to the ending of each reporting period, ensuring that the backfill end date is synchronized with the actual reporting periods.

4. Click **Submit**. The Changes Recorded page appears.

Disable Backfill Management

Once you have enabled Backfill, it may become necessary to disable it. If Backfill is disabled, Backfill functionality no longer appears throughout PowerSchool.

How to Disable Backfill Management

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Backfill Preferences**. The Attendance Backfill Preferences page appears.
3. Deselect the **CA Continuation School Backfill Enabled** checkbox to disable Backfill Management.
4. Click **Submit**. The Changes Recorded page appears.

Manage Backfill

You can run Backfill as a separate process using Backfill Management. There are certain situations that can occur during Realtime Backfill that mandate using Backfill Management. Specifically, attendance being changed for a week in which backfill was already applied or student's being withdrawn from classes in the middle of the week can result in backfill calculations being incorrect. The proper way to ensure that the calculations are correct and that all backfill has been applied for the backfill period is to run the Validate Backfill function. This function performs these three tasks:

- Corrects any miscalculations that may have occurred due to attendance changes made to weeks that already had backfill applied.
- Corrects any orphaned backfilled records caused by student's withdrawing from classes or withdrawing from the continuation education program.
- Performs the backfill process for any students who may not have had backfilled applied. This typically occurs if the option for Realtime Backfill has not been enabled in the school's attendance preferences page.

The Backfill process must be run whether or not Realtime Backfill has been enabled to ensure that calculations have been correctly applied for all students. The process performs quickly if Realtime Backfill is enabled, since only exception students are recalculated. If Realtime Backfill is not enabled or has not been used during the backfill period, the backfill process calculates backfill for each student who has enrolled in the continuation education program during the backfill period.

When running the Backfill process, you have two options. The first option is to run the Validate Backfill function, which runs all three tasks of clearing backfill, regenerating attendance aggregation, and running backfill in succession for all students in the selected school. The second option is to run the three tasks separately, which allows you to run the process for all or a selected group of students to perform corrections and problem diagnosis.

Note: Backfill should be run prior to running the California's Alternative Education reports, see the *California State Reporting Attendance and Membership Report Guide* available on PowerSource.

Option 1 – One-Step Backfill Process

- Verify Term (optional)
- Verify Backfill Preferences (optional)
- Validate Backfill
- Monitor the Backfill Process (optional)

- View Backfill Details (optional)

Option 2 – Three-Step Backfill Process

- Verify Term (optional)
- Verify Backfill Preferences (optional)
- Select Students
- Clear Backfill
- Regenerate Attendance Aggregation
- Run Backfill
- Monitor the Backfill Process (optional)
- View Backfill Details (optional)

Verify Term

Be sure you have selected the term in which you want to work.

Note: The school year of the currently selected term is used to determine which backfill start and end date to use when performing backfill functions. The actual term is not factored into this calculation.

How to Verify the Term

1. On the start page, note the term that appears in the navigation toolbar at the top of the page.
2. Verify the term is correct.
3. Select a different term, if needed:
    - Click **Term**. The Term pop-up menu appears.
    - Choose the term from the **Change To** pop-up menu. The navigation toolbar displays the name of the selected term.

Verify Backfill Preferences

Be sure backfill preferences are set accordingly.

How to Verify Backfill Preferences

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Backfill Preferences**. The Attendance Backfill Preferences page appears.
3. Verify preferences are set correctly.

4. Edit if needed. For field descriptions, see *Configure Backfill Preferences*.
5. Click **Submit**. The Changes Recorded page appears.

Select Students

When performing the three-step backfill process, either select a student or group of students you want to work with or use one of the student selection options on the Backfill Manage page.

Note: If you are performing the one-step backfill process, it is not necessary to make a student selection.

How to Select a Student of Group of Students

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. To continue, see Step 4 of *Clear Backfill*.

How to Use the Student Selection Options

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Do one of the following:

- Click **Select Backfill Students** to select all students enrolled in the backfill program during the backfill interval.
- Click **Select Backfill Exception Students** to select all students who have had attendance taken in a previously backfilled week.

5. To continue, see Step 4 of *Clear Backfill*.

Validate Backfill

Use the Validate Backfill function to ensure that backfill attendance has been correctly applied based on your attendance backfill preferences. Performing the Validate Backfill function runs all three tasks of clearing backfill, regenerating attendance aggregation, and running backfill in succession for all students in the selected school.

Note: If Realtime Backfill is enabled, only exception students are recalculated. If Realtime Backfill is not enabled or has not been used during the backfill period, Validate Backfill calculates backfill for each student who has enrolled in the continuation education program during the backfill period.

Note: it is not necessary to make a student selection when performing this procedure.

How to Validate Backfill

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Validate Backfill**. The Validate Backfill page appears.
5. Select the checkbox to verify the command.
6. Click **Submit.** When the function is complete, the Backfill Details page appears. For more information, see *View Backfill Details*.

Clear Backfill

If you are performing the three-step backfill process, the first function to run after you have made your student selection is the Clear Backfill function to clear backfilled attendance for all selected students.

How to Clear Backfill

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Clear Backfill**. The Clear Backfill page appears.
5. Select the **Select the checkbox to verify the command** checkbox.
6. Click **Submit**. When the function is complete, the Backfill Details page appears. For more information, see *View Backfill Details*.

Regenerate Attendance Aggregation

Once you have cleared backfilled attendance for all selected students, use the Regenerate Attendance Aggregation function to clear aggregated attendance for all selected students and regenerate that aggregation from stored Attendance records.

How to Regenerate Attendance Aggregation

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Re-Aggregate Attendance**. The Regenerate Attendance Aggregation page appears.
5. Select the **Select the checkbox to verify the command** checkbox.
6. Click **Submit**. When the function is complete, the Backfill Details page appears. For more information, see *View Backfill Details*.

Run Backfill

Once you have cleared aggregated attendance for all selected students and regenerate that aggregation, use the Run Backfill function to backfill time attendance based on your attendance backfill preferences.

How to Run Backfill

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Run Backfill**. The Run Backfill page appears.
5. Select the **Select the checkbox to verify the command** checkbox.
6. Click **Submit**. When the function is complete, the Backfill Details page appears. For more information, see *View Backfill Details*.

Monitor the Backfill Process

If you would like to monitor the Validate Backfill process, you can view the Process Status page.

How to Monitor the Backfill Process

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Statistics**. The Server Statistics page appears.

4. Scroll down to the **Handlers** section.
5. Click **Busy Handlers**. The Process Status page displays.

View Backfill Details

The View Backfill Details page provides an easy way to see the aggregated attendance minutes and how backfill has been applied for each student for each week in the current backfill date range.

How to View Backfill Details

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Backfill Management**. The Manage Backfill page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **View Backfill Details**. The View Backfill Details page displays the following information:

Field	Description
Backfill Week	Identifies the first day and the last day of the week for which aggregation is being shown. Aggregation occurs for every week within the backfill date range.
Days	Indicates the number of days within the week that were actual "in-session" school days. This is used to determine the maximum ADA that can be claimed and thus whether a week currently has excess hours or is short of hours.
Baseline CH	The total number of attendance minutes for the week that were entered through PowerSchool Meeting/Interval attendance or

	PowerTeacher attendance prior to any attendance minutes being used for or applied by the backfill process.
Baseline ISH	The total number of attendance minutes for the week that were entered through PowerSchool Time attendance and not marked as "Work Experience" prior to any attendance minutes being used for or applied by the backfill process.
Baseline WH	The total number of attendance minutes for the week that were entered through PowerSchool Time attendance and marked as "Work Experience" prior to any attendance minutes being used for or applied by the backfill process.
Baseline Total	The sum of the minutes reflected in Baseline CH, Baseline ISH, and Baseline WH.
Post-Backfill CH	The total number of minutes that were entered through PowerSchool Meeting/Interval attendance or PowerTeacher attendance, plus or minus any of these type of minutes that were either taken away or added by the backfill process.
Post-Backfill ISH	The total number of attendance minutes for the week that were entered through PowerSchool Time attendance and not marked as "Work Experience," plus or minus any of these type of minutes that were either taken away or added by the backfill process.
Post-Backfill WH	The total number of attendance minutes for the week that were entered through PowerSchool Time attendance and marked as "Work Experience," plus or minus any of these type of minutes that were either taken away or added by the backfill process.
Post-Backfill Total	The sum of the minutes reflected in Post-Backfill CH, Post-Backfill ISH, and Post-Backfill WH.
Categories - Ex	The total number of minutes entered using an attendance code assigned to the Excused Absences attendance code category

Categories - Ux	The total number of minutes entered using an attendance code assigned to the Unexcused Absences attendance code category.
Categories - S	The total number of minutes entered using an attendance code assigned to the Suspended Absences attendance code category.
Max Mins	The total possible apportionment for the week.
Backfill Type	identifies the type of backfill that was applied to the week by being subtracted from a subsequent week during the backfill process. The valid types are: • **CH** - Course Minutes • **ISH** - Independent Study Minutes • **WH** - Work Experience Minutes
Backfill Mins	The number of attendance minutes applied to the week by being subtracted from a subsequent week during the backfill process.
Backfill Week Date	The date of the week from which attendance minutes were subtracted and added to the current week during the backfill process.

Centris Sync Administrator Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Integration between IEP Direct with PowerSchool is available through the use of Centris Sync. By enabling Centris Sync, you can automatically feed data from PowerSchool to IEP Direct, which provides the ability to post the most current student and guardian demographic data to IEP Direct on a nightly basis.

Using AutoSend, once a day at a specified time, PowerSchool can generate a file that contains a set of objects for each student in the database. This file can be stored in a designated directory where it is retrieved and then removed by the Centris Sync Agent. For more information, see *AutoSend Setup*.

Setup

How to Enable Centris Sync

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **3rd Party Configuration**. The 3rd Party Configuration page appears.
3. In the Centris Group section, select the **Centris Group - IEP Viewer Enabled** checkbox.
4. Click **Submit**. The District Setup page appears.

How to Configure Centris Sync

Use the Centris Sync – SIS Data Integration page to configure PowerSchool to automatically feed data from PowerSchool to IEP Direct using Centris Sync.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page displays.
2. Under Server, click **System Settings**. The System Settings page displays.
3. Click **Centris Sync**. The Centris Sync – SIS Data Integration page displays.
4. Use the following table to enter information in the fields:

Field	**Description**
District ID	Enter the District ID provided by Centris.
District BEDS Code	Enter the District BEDS code provided by the BOCES/RIC. The BEDS Code is the district's BEDS identifier.

5. Click **Submit**.
6. Restart PowerSchool. Required the first time only; once enabled may be changed without restart.

Course Prerequisites User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

The introduction of Course Prerequisites provides the ability to define and enforce prerequisite rules that automatically limit the courses a student may request. With a multitude of options — such as percent grade, letter grade, credit hours, concurrent request, and teacher recommendation — you can build as comprehensive a rule as necessary for each course in order to help students request only those courses for which they are academically prepared to be successful.

Quick Start

To get started immediately, perform the following tasks to set up and begin using Course Prerequisites:

Course Prerequisites

- View the Course List
- Enter Prerequisites for Individual Courses
- Enter Prerequisites for All Listed Courses
- Enter Prerequisites for Entire Department
- Edit Prerequisites in Simple Rule Builder
- Edit Prerequisites in Complex Rule Builder
- Enter Rule Type Information

Prerequisites Notes

- View Prerequisites Notes
- Print Prerequisites Notes
- Add Prerequisite Notes
- Edit Prerequisite Notes
- Delete Prerequisite Notes

Course Prerequisites

Course prerequisite provides you with the ability to specify academic requirements or authorizations that must be fulfilled prior to a student's enrollment in a course and enforced at the time of student section enrollment request (during the request process). These requirements are primarily focused on the student's attainment of a sufficient grade or earned credits upon completion of one or many courses but may include additional or alternative criteria such as faculty recommendations, average percent grades, and concurrent enrollments in one or many specified sections.

Note: These procedures may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**.

Enter Prerequisites for Individual Courses

Use the following procedure to add course prerequisites to an individual course, such as to add a complex rule or quickly edit a rule for a specific course.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**.

How to Enter Course Prerequisite to an Individual Course

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Click the Number, Name, or Department of the course for which you want to add prerequisites. The Edit Course District Information page appears.
5. Click **Prerequisites**. The Edit Course Prerequisites page appears.
6. Enter descriptive text about the prerequisite in the **Prerequisite Note** field.

   Note: A maximum of 512 characters are allowed, including carriage returns and spaces.

7. Enter prerequisites as needed. For detailed information, see *Edit Prerequisites in Complex Rule Builder*.

   Note: Click **Reset** to discard any changes you've made and start again.

8. Click **Save**. The Courses page appears.

Enter Prerequisites for Selected Courses

Use the following procedure to add prerequisites to selected courses in the course list, such as to select courses that are advanced placement in a school to easily drag and drop rules from one course to another course across multiple departments.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**.

How to Enter Prerequisites for Selected Courses

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Click **Edit Prerequisites**. The Edit Course List Prerequisites page appears.
5. Enter prerequisites as needed. For detailed information, see *Edit Prerequisites in Simple Rule Builder*.

   Note: Click **Reset All Courses** to discard any changes you've made and start again.

6. Click **Save All Courses**. The Courses page appears.

Enter Course Prerequisites for Entire Department

Use the following procedure to add course prerequisites for multiple courses within a selected department, such as to select all courses in one department to easily drag and drop rules from one course to another within that department.

How to Enter Course Prerequisites for an Entire Department

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.

   Note: To narrow the course list, use the Filter function. For detailed information, see *How to View the Course List.*

3. Click a course in the Number, Name, or Department column that's within the department for which you want to add prerequisites. The Edit Course District Information page appears.
4. Click **Prerequisites**. The Edit Course Prerequisites page appears.

5. Click **Edit Prerequisites for Entire [Name] Department**. The Edit Course List Prerequisites page appears.
6. Enter prerequisites as needed. For detailed information, see *Edit Prerequisites in Simple Rule Builder*.

   Note: Click **Reset All Courses** to discard any changes you've made and start again.

7. Click **Save All Courses**. The Courses page appears.

Edit Prerequisites in Simple Rule Builder

Once you have selected the course or courses that you want to work with and navigated to the Edit Course List Prerequisites page, you can then enter "simple rule" information using the following procedures.

Note: To enter "complex rules" for a course, click the **Plus (+)** button in the upper-right corner of the course enclosure.

How to View/Hide Prerequisite Notes

1. Click the **Expand All Prerequisite Notes** link to view the prerequisite note field.
2. Enter descriptive text about the prerequisite in the **Prerequisite Note** field.

   Note: A maximum of 512 characters are allowed, including carriage returns and spaces.

3. Click the **Hide All Prerequisite Notes** link to hide the prerequisite notes field.

How to Add a Letter Grade Rule

Drag the **A+** icon to the enclosure to add a Letter Grade rule for this course. The template rule appears in the enclosure.

How to Add a Percent Grade Rule

Drag the **%** icon to add a Percent Grade rule for this course. The template rule appears in the enclosure.

How to Add a Credit Hours Rule

Drag the **C** icon to add a Credit Hours rule for this course. The template rule appears in the enclosure.

How to Add a Concurrent Request Rule

Drag the **R** icon to add a Concurrent Requests rule for this course. The template rule appears in the enclosure.

How to Add an Enclosure

Choose one of the following enclosures from the **Rule Type** pop-up menu:

- **All Of** – to indicate rule passes only if all enclosed rules pass.
- **Any Of** – to indicate rule passes if any one or more of the enclosed rules passes.

How to Add a Rule

1. Click the **Plus (+)** button in the upper-right corner of the enclosure in which you want to add a rule. The Pick Rule Type to Add pop-up window appears.
2. Choose one of the following prerequisites from the **Rule Type** pop-up menu:
    - **Average Percent Grade**
    - **Concurrent Request**
    - **Credit Hours**
    - **Letter Grade**
    - **Percent Grade**
    - **Recommend**

   The Add New pop-up window appears.

3. Enter information as needed. For detailed information, see *Enter Rule Type Information*.
4. Click **Add**. The Edit Course List Prerequisites appears.

How to Edit a Rule

Do one of the following:

- Double-click the rule.
- Click the **Pencil** icon in the upper-left corner of the rule.

How to Delete a Rule

Do one of the following:

- Click the **Minus (-)** button in the upper-right corner of the rule.

- Double-click the rule and click **Remove**.

Edit Prerequisites in Complex Rule Builder

Once you have selected the course or courses that you want to work with and navigated to the Edit Course Prerequisites page, you can then enter “complex rule” information. The complex rule builder allows you to use enclosures. An enclosure is a grouping of rules and other enclosures, where to be satisfied all of, any of or none of the enclosed rules/enclosures must be satisfied.

How to Add an Enclosure

1. Do one of the following:
    - Double-click the enclosure.
    - Click the **Plus (+)** button in the upper-right corner of the enclosure.

    The Pick Rule Type to Add pop-up window appears.

2. Choose one of the following enclosures from the **Rule Type** pop-up menu:

    Note: Pop-up menu options vary depending on the enclosure to which you are adding another enclosure.

    - **All Of** – to indicate rule passes only if all enclosed rules pass.
    - **None Of** – to indicate rule passes if none of the enclosed rules passes.
    - **Any Of** – to indicate rule passes if any one or more of the enclosed rules passes.

    The Add New pop-up window appears.

3. Click **Add**. The Edit Course Prerequisites appears.

How to Move an Enclosure

Drag and drop an enclosure from one enclosure to another.

How to Delete an Enclosure

Click the **Minus (-)** button in the upper-right corner of the enclosure.

How to Add Rule

1. Do one of the following:
    - Double-click the enclosure.
    - Click the **Plus (+)** button in the upper-right corner of the enclosure.

   The Pick Rule Type to Add pop-up window appears.

2. Choose one of the following prerequisites from the **Rule Type** pop-up menu:
    - **Average Percent Grade**
    - **Concurrent Request**
    - **Credit Hours**
    - **Letter Grade**
    - **Percent Grade**
    - **Recommend**

   The Add New pop-up window appears.

3. Enter information as needed. For detailed information, see *Enter Rule Type Information*.
4. Click **Add**. The Edit Course Prerequisites appears.

How to Move a Rule

Drag and drop a rule from one enclosure to another.

How to Edit a Rule

1. Do one of the following:
    - Double-click the rule.
    - Click the **Pencil** icon in the upper-left corner of the rule.

   The Edit or Delete pop-up window appears.

2. Edit information as needed. For detailed information, see *Enter Rule Type Information*.
3. Click **Okay**.

How to Delete a Rule

Do one of the following:

- Double-click the rule and click **Remove**.
- Click the **Minus (-)** button in the upper-right corner of the rule.

Enter Rule Type Information

When entering course prerequisites, whether using the simple rule builder or the complex rule builder, you must select a rule type then enter information for the selected rule type. Rule type information is entered from the Add New [Rule Type] pop-window or the Edit or Delete [Rule Type] pop-window.

How to Enter Letter Grade Rule

Use the following information to enter parameters in the fields in order to require the student to have passed another course with one of the specified letter grades:

Field	Description
Course Number	Enter the course the student needs to have taken.
Store Codes	Indicate the store codes you want to scan by doing one of the following: • Enter a store code to scan that specific store code. • Enter a comma-separated list of store codes to scan multiple store codes. • Leave blank to scan all store codes. **Note:** Store codes are codes set up in final grades setup. They generally map to the term code abbreviations, such as Q1, Q2, Q3, Q4 or S1, S2.
List of Grades	Indicate acceptable grades by doing one of the following: • Enter an acceptable grade. • Enter a comma-separated list of acceptable grades.
If the Student Retakes	Indicate what to do if multiple grades are stored for this course and store codes for a student by choosing one of the following from the pop-up menu: • **One must pass** • **All attempts must pass**

	• **The latest attempt must pass**
Presume Completion	Select the checkbox to assume that the grade the student will get for a course the student is currently enrolled in will pass this rule. Otherwise, leave the checkbox blank. **Note:** Generally, this checkbox should be selected as it allows students to request the “next” course in a series before they have fully completed and had their grades stored for the previous course in that series.
Make Defaults	Click to make the current entries the new default settings.

How to Enter Percent Grade Rule

Use the following information to enter parameters in the fields in order to require the student to have passed another course with a percentage grade within given bounds:

Field	**Description**
Course Number	Enter the course the student needs to have taken.
Store Codes	Indicate the store codes you want to scan by doing one of the following: • Enter a store code to scan that specific store code. • Enter a comma-separated list of store codes to scan multiple store codes. • Leave blank to scan all store codes. **Note:** Store codes are codes set up in final grades setup. They generally map to the term code abbreviations, such as Q1, Q2, Q3, Q4 or S1, S2.
Minimum Percentage	Enter the minimum passing percentage. Students passing with a lower grade will not be allowed to take this course.

Maximum Percentage	Enter the maximum passing percentage (inclusive). Students passing with a higher grade will not be allowed to take this course. Leave blank if no maximum applies.
If the Student Retakes	Indicate what to do if multiple grades are stored for this course and store code for a student by choosing one of the following from the pop-up menu: • One must pass • All attempts must pass • The latest attempt must pass • The average must pass
Presume Completion	Select the checkbox to assume that the grade the student will get for a course the student is currently enrolled in will pass this rule. Otherwise, leave the checkbox blank. **Note:** Generally, this checkbox should be selected as it allows students to request the "next" course in a series before they have fully completed and had their grades stored for the previous course in that series.
Make Defaults	Click to make the current entries the new default settings.

How to Enter Average Percent Grade Rule

Use the following information to enter parameters in the fields to require the student to have passed with percentage grades within given bounds, averaged across two or more courses:

Field	Description
Course Number List	Enter two or more courses the student needs to have taken.
Store Codes	Indicate the store codes you want to scan by doing one of the following: • Enter a store code to scan that specific store code.

	• Enter a comma-separated list of store codes to scan multiple store codes. • Leave blank to scan all store codes. **Note:** Store codes are codes set up in final grades setup. They generally map to the term code abbreviations, such as Q1, Q2, Q3, Q4 or S1, S2.
Minimum Percentage	Enter the minimum passing percentage. Students passing with a lower grade will not be allowed to take this course.
Maximum Percentage	Enter the maximum passing percentage (inclusive). Students passing with a higher grade will not be allowed to take this course. Leave blank if no maximum applies.
If the Student Retakes Any Course	Indicate what to do if multiple grades are stored for any of these courses and store codes for a student by choosing one of the following from the pop-up menu: • **Include all in average** • **Use highest in average** • **Use lowest in average**
Require a Grade in Each Course	Select the checkbox to require that a grade be recorded for each course listed. Otherwise, leave the checkbox blank.
Make Defaults	Click to make the current entries the new default settings.

How to Enter Credit Hours Rule

Use the following information to enter parameters in the fields to require the student to have passed other courses with earned credit hours within given bounds:

Field	Description
Course Number	Enter the course the student needs to have taken.

Store Codes	Indicate the store codes you want to scan by doing one of the following: • Enter a store code to scan that specific store code. • Enter a comma-separated list of store codes to scan multiple store codes. • Leave blank to scan all store codes. **Note:** Store codes are codes set up in final grades setup. They generally map to the term code abbreviations, such as Q1, Q2, Q3, Q4 or S1, S2.
Minimum Credit Hours	Enter the minimum passing credit hours. Students with fewer credit hours will not be allowed to take this course.
Maximum Credit Hours	Enter the maximum passing credit hours (inclusive). Students with more credit hours will not be allowed to take this course. Leave blank if no maximum applies.
If the Student Retakes	Indicate what to do if multiple grades are stored for this course and store code for a student by choosing one of the following from the pop-up menu: • **One must pass** • **All attempts must pass** • **The latest attempt must pass** • **The average credits must pass** • **The sum of all credits must pass**
Presume Completion	Select the checkbox to assume that the grade the student will get for a course the student is currently enrolled in will pass this rule. Otherwise, leave the checkbox blank. **Note:** Generally, this checkbox should be selected as it allows students to request the “next” course in a series before they have fully completed and had their grades stored for the previous course in that series.

Make Defaults	Click to make the current entries the new default settings.

How to Enter Concurrent Request Rule

Use the following information to enter parameters in the fields to require the student to request another course at the same time:

Field	Description
Course Number	Enter the course the student must request at the same time as this course.
Make Defaults	Click to make the current entries the new default settings.

How to Enter Recommend Rule

Use the following information to enter parameters in the fields to require a teacher to recommend the student for this course:

Field	Description
Department	Enter the department to limit the ability of other teachers to satisfy recommendation rules they are not authorized to make. **Note:** For detailed information about how to associate departments to teachers, see *Staff Schedule Setup*.
Make Defaults	Click to make the current entries the new default settings.

Prerequisite Notes

When adding or editing course prerequisites, you can also enter descriptive text about the prerequisite, such as "Completion or current enrollment in Biology." A maximum of 512 characters are allowed, including carriage returns and spaces. This information appears in PowerSchool, as well as PowerSchool Parent.

Note: These procedures may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**.

View Prerequisite Notes

Use the following procedure to view prerequisite notes for selected courses.

How to View Prerequisite Notes

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.

   Note: To narrow the course list, use the Filter function. For detailed information, see *How to View the Course List*.

3. Note the **Prerequisites Note** column.

Print Prerequisite Notes

Use the following procedure to print a summary of prerequisite notes for selected courses.

How to Print Prerequisite Notes

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.

   Note: To narrow the course list, use the Filter function. For detailed information, see *How to View the Course List*.

3. Click **Print**. The Course Prerequisite Rule Notes pop-up window appears.
4. Click **Print**. The Print pop-up window appears.
5. Click **Print**. The Print pop-up window closes.

6. Close the Course Prerequisite Rule Notes pop-up window.

Add Prerequisite Notes

Use the following procedure to create a prerequisite note for a selected course.

How to Add a Prerequisite Note

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.

   Note: To narrow the course list, use the Filter function. For detailed information, see *How to View the Course List*.

3. Click the course in the Number, Name, or Department column for which you want to add a prerequisite note. The Edit Course District Information page appears.
4. Click **Prerequisites**. The Edit Course Prerequisites page appears.
5. Enter descriptive text about the prerequisite in the **Prerequisite Note** field.
6. Click **Save**.

Edit Prerequisite Notes

Use the following procedure to edit a prerequisite note for a selected course.

How to Edit a Prerequisite Note

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.

   Note: To narrow the course list, use the Filter function. For detailed information, see *How to View the Course List*.

3. Click the course in the Number, Name, or Department column for which you want to edit prerequisite note. The Edit Course District Information page appears.
4. Click **Prerequisites**. The Edit Course Prerequisites page appears.
5. Edit the descriptive text about the prerequisite in the **Prerequisite Note** field.
6. Click **Save**.

Delete Prerequisite Notes

Use the following procedure to delete a prerequisite note from a selected course.

How to Delete a Prerequisite Note

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.

   Note: To narrow the course list, use the Filter function. For detailed information, see *How to View the Course List*.

3. Click the course in the Number, Name, or Department column for which you want to delete a prerequisite note. The Edit Course District Information page appears.
4. Click **Prerequisites**. The Edit Course Prerequisites page appears.
5. Remove the descriptive text about the prerequisite in the **Prerequisite Note** field.
6. Click **Save**.

Prerequisite Overrides

In instances where course prerequisites were not fulfilled prior to a student requesting a course, you can use the Manage Prerequisite Overrides page to override the prerequisite requirements and allow the student to request the course.

Note: To manage prerequisite overrides for multiple students, see *Invalid Requests*.

How to View Prerequisite Overrides

Use the following procedure to view prerequisite overrides for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page displays the following information for each existing prerequisite override:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Course Number	The number of the course for which a prerequisite is being overridden.
Course Name	The name of the course for which a prerequisite is being overridden.
Overridden By	The PowerSchool user who entered the prerequisite override. **Note:** This information does not change if edited by another PowerSchool user.
Comments	Any comments related to the override. **Note:** This information only appears within the PowerSchool Manage Prerequisite Overrides pages.

How to Override a Prerequisite

Use the following procedure to override a course prerequisite for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page appears.
4. Click **Create New Override**. The Add / Edit Prerequisite Override page appears.
5. Use the table to enter information in the following fields:

Field	Description
Course Number	Enter the number of the course for which you want to override a prerequisite. **Note:** This field is required.
Scheduling Year	Choose the school year in which the course you want to override is scheduled from the pop-up menu.
Comments	Enter any comments related to the override. **Note:** This information only appears within the PowerSchool Manage Prerequisite Overrides pages.

6. Click **Submit**. The Manage Prerequisite Overrides page appears.

How to Edit a Prerequisite Override

Use the following procedure to edit an existing prerequisite override for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page appears.
4. Click the **Pencil** icon for the override you want to edit. The Add / Edit Prerequisite Override page appears.

5. Enter information as needed. For detailed information, see *Override Prerequisites*.
6. Click **Submit**. The Manage Prerequisite Overrides page appears.

How to Delete a Prerequisite Override

Use the following procedure to delete an existing prerequisite override for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page appears.
4. Click the **Pencil** icon for the override you want to delete. The Add / Edit Prerequisite Override page appears.
5. Click **Delete**. The Manage Prerequisite Overrides page appears.

Recommendations

Using the Manage Recommendations page, you can manage student course recommendations. Course recommendations may be required as a prerequisite or they may be purely advisory, where a teacher wishes to advise a student on the path they feel best suits their talents and potential. One a recommendation is made, it appears on the student's Class Registration page in PowerSchool Parent.

How to View Recommendations

Use the following procedure to view course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page displays the following information for each existing recommendation:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Year	The school year in which the course being recommended is scheduled.
Course Number	The number of the course for which a recommendation is being made.
Course Name	The name of the course for which a recommendation is being made.
Recommended By	The PowerSchool user who entered the recommendation. **Note:** This information does not change if edited by another PowerSchool user.
Comments	Any comments related to the recommendation.

	Note: This information only appears within the PowerSchool Manage Recommendations pages.

How to Add a Recommendation

Use the following procedure to create new course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page appears.
4. Click **Create New Recommendations**. The Add/Edit Recommendations page appears.
5. Use the table to enter information in the following fields:

Field	Description
Course Number	Enter the number of the course for which you want to recommend. **Note:** This field is required.
Scheduling Year	Choose the school year in which the course you want to recommend is scheduled from the pop-up menu.
Comments	Enter any comments related to the recommendation. **Note:** This information only appears within the PowerSchool Manage Recommendations pages.

6. Click **Submit**. The Manage Recommendations page appears.

How to Edit a Recommendation

Use the following procedure to edit existing course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page appears.
4. Click the **Pencil** icon for the recommendation you want to edit. The Add / Edit Recommendation page appears.
5. Enter information as needed. For detailed information, see *Add Recommendations*.
6. Click **Submit**. The Manage Recommendations page appears.

How to Delete a Recommendation

Use the following procedure to delete existing course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page appears.
4. Click the **Pencil** icon for the recommendation you want to delete. The Add / Edit Recommendation page appears.
5. Click **Delete**. The Manage Recommendations page appears.

Invalid Requests

The Invalid Request function provides you with the ability to evaluate all course requests for a selected group of students and identify any course requests where prerequisites have not been met. Once students with invalid course requests are identified, you can then research and reconcile those course requests. For course requests that cannot be reconciled, you can perform a number of group functions with those students, such as printing reports or form letters for those students.

Note: To manage prerequisite overrides for individual students, see *Prerequisite Overrides*.

How to View Invalid Requests

Use the following procedure to view invalid course requests for a selected group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Invalid Requests**. The Invalid Requests Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following information to enter parameters in the fields:

Field	Description
Students	The number of students for which you will perform the Invalid Request function.
Re-Evaluate	Do one of the following: • If you recently performed this function and do not expect the list of results to have changed, select the **Don't re-evaluate; display last results** option. This is the quicker option.

	• If this is the first time you have performed this function, or you haven't performed it recently, select the **Re-evaluate and display new results** option. Selecting this option may take several minutes to complete as all requests for the selected students are evaluated.
School Year	Select the school year in which you want to check for invalid requests.
Courses	Do one of the following: • Select the **All courses** option to perform the function for all courses within the selected district or school. • Select the **Courses in this department** option to perform the function for all courses within a specific department. Then, enter the department name in the field provided. • Select the **Only this course** option to perform the function for a specific course. Then, enter the course number in the field provided.

5. Click **Submit**. The Invalid Requests page displays the following information for each invalid request:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Last Name	The student's last name. Click to access the student pages for this student.
First Name	The student's first name. Click to access the student pages for this student.
Course	The number and name of the course the student requested.

Prerequisite	The prerequisite note indicating the course requirement.
Research	To research invalid course request, see *Research Invalid Requests*.
Take Action	To override an invalid course requests, see *Override Invalid Requests*. To edit an invalid course requests, see *Edit Invalid Requests*. **Note:** The icons appear shaded until you perform an action.

6. Click **Re-Evaluate Requests** to apply updates.

   Note: If you navigate away from the Invalid Request page before clicking **Re-Evaluate Requests**, any updates will be discarded.

7. To work with the group of students, click **Make these students the current selection**. The Student Selection page appears.

How to Research Invalid Requests

Use the following procedure to research invalid course requests for a selected student.

1. Perform Step 1 through Step 4 of *View Invalid Requests*. The Invalid Requests page appears.
2. To view historical grades:
   a. Click the **A+** icon. The Historical Grades pop-up window appears.
   b. Click **View/edit in a new window** to update information from the Historical Grades page or click **Close**.
3. To view requests:
   a. Click the **R** icon. The Requests pop-up window appears.
   b. Click **View/edit in a new window** to update information from the Modify Schedule - Requests page or click **Close**.

How to Override an Invalid Request

Use the following procedure to override an invalid course requests for a selected student. Once an override is submitted, it will not appear as an invalid request the next time you re-evaluate requests.

1. Perform Step 1 through Step 4 of *View Invalid Requests*. The Invalid Requests page appears.
2. Click the **O** icon. The Override Prerequisite pop-up window appears.
3. Enter any comments related to the override.
4. Click **Submit**. The Override Prerequisite pop-up window closes.

How to Edit an Invalid Course Request

Use the following procedure to edit an invalid course requests for a selected student.

1. Perform Step 1 through Step 4 of *View Invalid Requests*. The Invalid Requests page appears.
2. Click the **Pencil** icon to edit course request for student. The Change Request pop-up window appears.
3. Do one of the following:
    - Enter a different course number in the **Course Number**, and then click **Submit**. The Change Request pop-up window closes.
    - Click **View/edit in a new window** to update information from the Modify Schedule - Requests page.

Teacher Recommendations

Using the Recommendations page, you can manage course recommendations for your students. Course recommendations may be required as a prerequisite or they may be purely advisory, where you wish to advise a student on the path you feel best suits their talents and potential. Once a recommendation is made, it appears on the student's Class Registration page in the PowerSchool Student and Parent portal.

Work with Students

Using the Recommendations List page, you can view, create, edit, and delete recommendations for students within a specific class. To navigate to the Recommendations List page, click the **Student Information** (backpack) icon next to the class for which you want to work with. Click the last name of the student you want to work with. And then, choose **Recommendations** from the **Select screens** pop-up menu.

How to View Recommendations for a Student

Use the following procedure to view all course recommendations you have made for a specific student.

1. On the Current Classes page, click the **Student Information** (backpack) icon next to the class for which you want to work with. The Student Information page appears with the selected class roster displayed in the navigation menu.
2. Click the last name of the student you want to work with. The student information displays the default page previously selected.
3. Choose **Recommendations** from the **Select screens** pop-up menu. The Recommendations List page displays the following information for each recommendation:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Year	The school year for which the recommendation was made.
Course Number	The number of the course for which the recommendation was made.

Course Name	The name of the course for which the recommendation was made.
Comments	Any comments related to the recommendation. **Note:** This information appears in PowerSchool and in PowerTeacher.

How to Add a Recommendation

Use the following procedure to create new course recommendations for a selected student.

1. On the Current Classes page, click the **Student Information** (backpack) icon next to the class for which you want to work with. The Student Information page appears with the selected class roster displayed in the navigation menu.
2. Click the last name of the student you want to work with. The student information displays the default page previously selected.
3. Choose **Recommendations** from the **Select screens** pop-up menu. The Recommendations List page appears.
4. Click **Create New Recommendation**. The Add/Edit Recommendation page appears.
5. Use the table to enter information in the following fields:

Field	Description
Course Number	Enter the number of the course for which you want to recommend. **Note:** This field is required.
Scheduling Year	Choose the school year in which the course you want to recommend is scheduled from the pop-up menu.
Comments	Enter any comments related to the recommendation. **Note:** This information appears in PowerSchool and in PowerTeacher.

6. Click **Submit**. The Recommendations List page appears.

How to Edit a Recommendation

Use the following procedure to edit existing course recommendations for a selected student.

Note: You may also edit a recommendation using the Recommendations page. For more information, see *How to Edit Recommendations*.

1. On the Current Classes page, click the **Student Information** (backpack) icon next to the class for which you want to work with. The Student Information page appears with the selected class roster displayed in the navigation menu.
2. Click the last name of the student you want to work with. The student information displays the default page previously selected.
3. Choose **Recommendations** from the **Select screens** pop-up menu. The Recommendations List page appears.
4. Click the **Pencil** icon for the recommendation you want to edit. The Add/Edit Recommendation page appears.
5. Enter information as needed. For detailed information, see *How to Add a Recommendation*.
6. Click **Submit**. The Recommendations List page appears.

How to Delete a Recommendation

Use the following procedure to delete existing course recommendations for a selected student.

Note: You may also delete a recommendation using the Recommendations page. For more information, see *How to Delete Recommendations*.

1. On the Current Classes page, click the **Student Information** (backpack) icon next to the class for which you want to work with. The Student Information page appears with the selected class roster displayed in the navigation menu.
2. Click the last name of the student you want to work with. The student information displays the default page previously selected.
3. Choose **Recommendations** from the **Select screens** pop-up menu. The Recommendations List page appears.
4. Click the **Pencil** icon for the recommendation you want to delete. The Add/Edit Recommendation page appears.
5. Click **Delete**. The Recommendations List page appears.

Work with Student Groups

Using the Recommendations page, you can view, create, edit, and delete recommendations for students in all your classes. To navigate to the Recommendations page, click **Recommendations** from the navigation menu.

How to View Recommendations for All Students

Use the following procedure to view all course recommendations you have made for all students.

Note: All recommendations for all schools display on this page, regardless of which school is selected on the **School** pop-up menu.

1. On the start page, click **Recommendations** from the navigation menu. The Recommendations page displays the following information for each existing recommendation:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Filter (Recommendations)	Click the arrow to expand this section. Click the arrow again to collapse this section. **How to Filter Recommendations (Simple)** To narrow the list of recommendations using simple search: 1. Verify the **Advanced** checkbox is deselected. 2. Enter search criteria in the search field. 3. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**. **How to Filter Recommendations (Advanced)** To narrow the list of recommendations using advanced search: 1. Select the **Advanced** checkbox. 2. Choose the column by which you want to filter courses: • **Comment** • **Course Name** • **Course Number** • **Created**

	• **First Name** • **Last Name** • **Year** 3. Do one of the following: • Enter search criteria in the search field. • Select search criteria from the pop-up menu. 4. To add another filter, click **+** and repeat Step 1. 5. To delete a filter, click **-** next the filter. 6. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.
Year	The school year for which the recommendation was made.
Last Name	The student's last name for which the recommendation was made.
First Name	The student's first name for which the recommendation was made.
Course Number	The number of the course for which the recommendation was made.
Course Name	The name of the course for which the recommendation was made.
Created	The date and time the recommendation was made.
Comments	Any comments related to the recommendation. **Note:** This information appears in PowerSchool and in PowerTeacher.

How to Add Recommendations

1. On the start page, click **Recommendations** from the navigation menu. The Recommendations page appears.
2. Click **Create Recommendations**. The Add Recommendation drawer opens.

3. Use the following table to enter information in the Step 1: Select Students from Classes section:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Class(es)</td><td>The following information displays for each class:
Period/Day
Section Number
Course Name
Course Number
Note: Click column headings to sort in ascending order. Click again to sort in descending order.
Indicate the classes that contains the students for which you want to create recommendations by doing one of the following:
Select the checkbox in the header row to select all classes. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all classes.
Select the checkbox for each class you want to work with.</td></tr>
<tr><td>Students</td><td>The following information displays for each student:
Last Name
First Name
Student Number
Note: Click column headings to sort in ascending order. Click again to sort in descending order.
Indicate the students for which you want to create recommendations by doing one of the following:
Select the checkbox in the header row to select all students. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students.</td></tr>
</table>

	• Select the checkbox for each student you want to work with. **Note:** When adding classes, selected students are retained. When removing classes, only students in the remaining selected classes are retained.

4. Click **Next**.
5. Use the following table to enter information in the Step 2: Select Courses and Enter a Comment section:

Field	**Description**
Year for Recommendation	Choose the school year in which the course you want to recommend is scheduled from the pop-up menu. **Note:** The current year displays by default. However, if next year is set up in PowerScheduler, then the next year displays as the default. This requires the active scenario to have a valid course catalog associated with it and the scheduling year for that scenario is set for the upcoming year.
Courses to Recommend Filter [Courses]	Click the arrow to expand this section. Click the arrow again to collapse this section. **How to Filter Courses (Simple)** To narrow the list of courses using simple search: 1. Verify the **Advanced** checkbox is deselected. 2. Enter search criteria in the search field. 3. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**. **How to Filter Courses (Advanced)** To narrow the list of courses using advanced search: 1. Select the **Advanced** checkbox. 2. Choose the column by which you want to filter courses: • **Course Name**

	• **Course Number** • **Department** 3. Do one of the following: • Enter search criteria in the search field. • Select search criteria from the pop-up menu. 4. To add another filter, click **+** and repeat Step 1. 5. To delete a filter, click **-** next the filter. 6. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.
[Courses]	The following information displays for each class: • Course Name • Course Number • Department **Note:** Click column headings to sort in ascending order. Click again to sort in descending order. Select the checkbox for each class you want to work with. Alternately, if a checkbox is already selected, deselect the checkbox to remove the class. **Note:** If the current year is selected as the **Year of Recommendation**, active courses at the school where those sections are taught displays. If the next year is selected as the **Year of Recommendation**, courses in the course catalog in PowerScheduler related to the active scenario at the school where those sections are taught display.
Selected Courses	The course name and course number for each selected course you want to recommend appears.
Comments	Enter any comments related to the recommendation. **Note:** This information appears in PowerSchool and in PowerTeacher.

6. Click **Submit**. The Add Recommendation drawer closes. The Recommendations page displays the new recommendation(s).

How to Edit Recommendations

1. On the start page, click **Recommendations** from the navigation menu. The Recommendations page appears.
2. To narrow the list of recommendations, see *How to Filter Recommendations*.
3. Click the **Pencil** icon for the recommendation you want to edit. The Edit Recommendation drawer opens.
4. Edit the information as needed. For field descriptions, see Step 5 of *How to Add Recommendations*.
5. Click **Submit.** The Edit Recommendation drawer closes. The Recommendations page displays the updated recommendation(s).

How to Delete Recommendations

1. On the start page, click **Recommendations** from the navigation menu. The Recommendations page appears.
2. To narrow the list of recommendations, see *How to Filter Recommendations*.
3. Click the **Pencil** icon for the recommendation you want to delete. The Edit Recommendation drawer opens.
4. Click **Delete**.
5. Click **Confirm Delete**. The Recommendations page no longer displays the recommendation(s).

Student Requests

Using the Class Registration page in PowerSchool Parent, students and their parents can manage their course requests.

Register for Classes

Use the following procedure to request classes for the next year.

How to Register for Classes

Use the following procedure to request classes for the next year.

How to Register for Classes

1. On the main menu, click **Class Registration**. The Class Registration page appears.

   Note: A **Road** icon appears if a teacher has recommended the course. Click to view the recommending teacher. A **Note** icon appears if the course contains prerequisite notes. Click to view.

2. Click the **Pencil** icon to select courses from each area as instructed. The Course Request pop-up window appears.
3. Use the following table to enter information in the fields:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
[Course]	Select the checkbox for each course you want to request.
Course Name	The name of the course.
Number	The number used to identify the course.
Credits	The number of credits you receive for taking the course.

Prerequisite Notes	Descriptive text about the prerequisite, if any.
Alerts	Alert to indicate prerequisites have not been met, if any.

4. Click **Okay**. The Course Request pop-up window closes. A green checkmark appears in the area for which you selected courses.

   Note: A red exclamation mark appears if courses need to be selected for an area.

5. Repeat Step 2 through Step 4 for each course request.
6. Click **Submit**. The [Scheduling Year] Course Requests page appears.

View Course Requests

Use the following procedure to view any existing course requests.

How to View Course Requests

1. On the main menu, click **Class Registration**. The Class Registration page appears.
2. Click **View future course requests**. The [Scheduling Year] Course Requests page.

Custom Fields and Screens User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool provides tools to create custom fields and screens to display a variety of information about courses, sections, staff, and students. First, create the custom fields. Next, create the custom screen. Finally, add the custom fields to the custom screen.

ODBC/JDBC Access to Custom Fields

Once custom fields are created, you can then easily access that information using ODBC/JDBC. For more information, see the *PS_CustomFields API Guide* available on PowerSource.

Setup

Custom Student Fields and Screens

Use custom Student Fields and Screens function to display a variety of information about students. PowerSchool supports the addition of up to 999 custom student fields. For example, create a page that includes vehicle-related information that you want to track for each student. First, create the custom fields. Next, create the custom screen. Finally, add the custom fields to the custom screen you create.

How to Add Custom Student Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Student Fields**. The Student Fields page appears.
4. Click **New**. The New Student Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field.
Description	Enter an explanation of the field and its purpose.

6. Click **Submit**. The Student Fields page displays the new field.

How to Edit Custom Student Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Student Fields**. The Student Fields page appears.
4. Click the name of the field you want to edit. The Edit Student Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Student Fields*.
6. Click **Submit**. The Student Fields page displays the edited field.

How to Delete Custom Student Fields

Deleting a custom field also deletes the field from any custom pages and the values of that field. If you manually entered the field on a PowerSchool page, you must manually remove the field from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Student Fields**. The Student Fields page appears.
4. Click the name of the field you want to delete. The Edit Student Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

   Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message appears indicating that the process is complete. The Custom Field Deleted page appears.

   Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

How to Add Custom Student Screens

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **New**. The Edit Custom Student Screen page appears.
5. Enter the name of the screen in the Name field.
6. Click **Submit**. The Custom Student Screens page displays the new page.
7. Click **Edit Fields** next to the new screen. The List Custom Student Screen Fields page appears.
8. Click **New**. The Edit Field page appears.
9. Use the following table to enter information in the fields:

Field	**Description**
Label	Enter the name you want to appear for the field on the custom screen.
Field Name	Enter the name of the field. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears. **Note:** Database extension fields can be selected on the **Fields** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource. **Note:** To create a custom field, see *How to Add Custom Student Fields*.

Sort Order	Enter a number to indicate the order in which you want this field to appear on the custom screen.
Input Type	Use the pop-up menu to choose one of the following to determine the type of field you are creating: • **Entry field**: A small field in which the user enters free text. • **Static field**: A field in which you cannot change the text. Use static fields to create headers above fields you want to group together, or to explain a field you place below it. • **Checkbox**: A checkbox a user clicks to select. • **Pop-up menu**: A pop-up menu from which a user selects a value. • **Radio button**: A small, round option button a user clicks to select. • **Entry box**: A large box in which users can enter multiple lines of free text.
Width	If you chose **Entry field** or **Entry box** at the Input Type field, enter the width in characters of the field or box.
Height	If you chose **Entry box** at the Input Type field, enter the height of the box in lines.
Data for Popup or Radio Buttons	If you chose **Pop-up menu** or **Radio button** at the Input Type field, enter the options the users can select at the field.

10. Click **Submit**. The List Custom Student Screen Fields page displays the field.
11. Repeat steps 8-10 for each field on the custom screen.

Note: For more information about viewing the custom screen, see *Custom Screens*.

How to Edit Custom Student Screens

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Student Screen page appears.
5. Edit the name of the custom student screen in the Name field.
6. Click **Submit**. The Student Custom Screens page displays the edited screen.

How to Delete Custom Student Screens

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Student Screen page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Edit Custom Student Screen Fields

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **Edit Fields** next to the screen you want to edit. The List Custom Student Screen Fields page appears.
5. Click the field you want to edit. The Edit Field page appears.

6. Edit the information as needed. For field descriptions, see *How to Add Custom Student Screens*.
7. Click **Submit**. The List Custom Student Screen Fields page displays the edited field.

How to Delete Custom Student Screen Fields

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **Edit Fields** next to the screen you want to edit. The List Custom Student Screen Fields page appears.
5. Click the field you want to edit. The Edit Field page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export a Student Screen as a Template

Export a custom screen to share with other PowerSchool administrators or to save as a backup for the custom screen. In addition, by exporting a custom screen and then deleting it, you can remove a custom screen from the system without losing it permanently.

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **Edit Fields** next to the screen to be exported as a template. The List Custom Student Screen Fields page appears.
5. Click **Export this screen as a template**. The File Download dialog appears.
6. Select **Save File As...** or **Save this file to disk**.
7. Click **OK**. The Save As dialog appears.
8. Select a file location.

9. Click **Save**. The custom screen saves as a template, and the List Custom Student Screen Fields page appears.

Custom Course Fields

Use custom Course Fields function to display a variety of information about courses. PowerSchool supports the addition of up to 999 custom course fields. For example, create a custom field called Demand to track last year's demand for a particular course. Create the custom course fields. Then, either add the custom fields to a page in PowerSchool or enter values for the fields using the Direct Database Access function, also known as Universal Search & Modify (USM).

How to Add Custom Course Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Course Fields**. The Course Fields page appears.
4. Click **New**. The New Course Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field.
Description	Enter an explanation of the field and its purpose.

6. Click **Submit**. The Course Fields page displays the new field.

How to Edit Custom Course Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Course Fields**. The Course Fields page appears.
4. Click the name of the field you want to edit. The Edit Course Field page appears.

5. Edit the information as needed. For field descriptions, see *How to Add Custom Course Fields*.
6. Click **Submit**. The Course Fields page displays the edited field.

How to Delete Custom Course Fields

Deleting a custom field deletes the field and its values. If you manually entered the field on a PowerSchool page, you must manually remove the field from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Course Fields**. The Course Fields page appears.
4. Click the name of the field you want to delete. The Edit Course Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

   Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message appears indicating that the process is complete. The Custom Field Deleted page appears.

   Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

Custom Section Fields

Use custom Section Fields function to display a variety of information about sections. PowerSchool supports the addition of up to 999 custom section fields. For example, create a custom field called Field Trip to identify the field trips taken during a particular section. Create the custom section fields. Then, either add the custom fields to a page in PowerSchool or enter values for the fields using the Direct Database Access function, also known as Universal Search & Modify (USM).

How to Add Custom Section Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Section Fields**. The Section Fields page appears.
4. Click **New**. The New Section Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field.
Description	Enter an explanation of the field and its purpose.

6. Click **Submit**. The Section Fields page displays the new field.

How to Edit Custom Section Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Section Fields**. The Section Fields page appears.
4. Click the name of the field you want to edit. The Edit Section Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Section Fields*.
6. Click **Submit**. The Section Fields page displays the edited field.

How to Delete Custom Section Fields

Deleting a custom field deletes the field and its values. If you manually entered the field on a PowerSchool page, you must manually remove it from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Section Fields**. The Section Fields page appears.
4. Click the name of the field you want to delete. The Edit Section Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message indicates that the process is complete. The Custom Field Deleted page appears.

   Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

Custom Staff Fields and Screens

Use custom Staff Fields and Screens function to display a variety of information about staff. PowerSchool supports the addition of up to 999 custom staff fields. For example, create a page that includes teacher certification fields to track this information for each teacher. First, create the custom fields. Then, create the custom screen. Finally, add the custom fields to the custom screen you created.

How to Add Custom Staff Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Staff Fields**. The Staff Fields page appears.
4. Click **New**. The New Staff Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field, such as **address**.
Description	Enter an explanation of the field and its purpose, such as **Street Address**.

6. Click **Submit**. The Staff Fields page displays the new field.

How to Edit Custom Staff Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Staff Fields**. The Staff Fields page appears.
4. Click the name of the field you want to edit. The Edit Staff Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Staff Fields*.
6. Click **Submit**. The Staff Fields page displays the edited field.

How to Delete Custom Staff Fields

Deleting a custom field also deletes that field and its values from any custom pages. If you manually entered the field on a PowerSchool page, you must manually remove the field from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Staff Fields**. The Staff Fields page appears.
4. Click the name of the field you want to delete. The Edit Staff Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

   Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message indicates that the process is complete. The Custom Field Deleted page appears.

   Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

How to Add Custom Staff Screens

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click **New**. The Edit Custom Staff Screen page appears.
5. Enter the name of the screen in the Name field.
6. Click **Submit**. The Custom Staff Screens page displays the new page.
7. Click **Edit** next to the new screen. The List Custom Staff Screen Fields page appears.
8. Click **New**. The New Custom Staff Screen Fields: [Name] page appears.
9. Use the following table to edit information in the fields:

Field	**Description**
Label	Enter the name you want to appear for the field on the custom screen, such as **Address**.
Field Name	Enter the name of the field. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears. **Note:** Database extension fields can be selected on the **Fields** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource. **Note:** To create a custom field, see *How to Add Custom Staff Fields*.
Sort Order	Enter a number to indicate the order in which you want this field to appear on the custom screen.
Input Type	Use the pop-up menu to choose one of the following to determine the type of field you are creating: • **Entry field**: A small field in which the user enters free text.

	• **Static field**: A field in which you cannot change the text that displays. Use static fields to create headers above fields you want to group together, or to explain a field you place below it. • **Checkbox**: A checkbox a user clicks to check. • **Pop-up menu**: A pop-up menu from which a user selects a value. • **Radio button**: Small, round option button a user clicks to select. • **Entry box**: A large box in which users can enter multiple lines of free text.
Width	If you chose **Entry field** or **Entry box** at the Input Type field, enter the width in characters of the field or box.
Height	If you chose **Entry box** at the Input Type field, enter the height of the box in lines.
Data for Popup or Radio Buttons	If you chose **Pop-up menu** or **Radio button** at the Input Type field, enter the options the users can select at the field. A pop-up menu contains values, which consists of two segments. The first segment is the value that is stored in the database. This value is not visible on the Custom Screen page. The second segment is the label, which appears within the pop-up menu. The first and second segments use a semi-colon as a delimiter. To set a default value for a pop-up menu, enter a semi-colon as the delimiter and then enter an asterisk at the end of the default entry. The following is an example of a properly formatted data for a pop-up menu where "4;Both" is the default entry: 1;Mother 2;Father 3;Guardian 4;Both;* 5;Aunt 6;Uncle 0;Unknown A radio button follows the same rules as pop-up menu. The only difference is that with a pop-up menu, you can enter numerous

	sets of values and a default may not be defined. With a radio button, you are limited to only two sets of values.

10. Click **Submit**. The Custom Staff Screen Fields: [Name] page displays the edited field.
11. Repeat steps 8-10 for each field on the custom screen.

    Note: For more information about viewing the custom screen, see *How to Edit Custom Staff Screens*.

How to Edit Custom Staff Screens

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Staff Screen page appears.
5. Edit the name of the custom staff screen in the Name field.
6. Click **Submit**. The Custom Staff Screens page displays the edited screen.

How to Delete Custom Staff Screens

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Staff Screen page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Edit Custom Staff Screen Fields

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click Edit next to the screen you want to edit. The Custom Staff Screen Fields: [Name] page appears.
5. Click the Label of the field you want to edit. The Edit Custom Staff Screen Field: [Name] page appears.
6. Edit the information as needed. For field descriptions, see *How to Add Custom Staff Screens*.
7. Click **Submit**. The Custom Staff Screen Fields: [Name] page displays the edited field.

How to Delete Custom Staff Screen Fields

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click **Edit** next to the screen you want to edit. The Custom Staff Screen Fields: [Name] page appears.
5. Click the Label of the field you want to delete. The Edit Custom Staff Screen Field: [Name] page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export a Staff Screen as a Template

Export a custom screen to share with other PowerSchool administrators or to save as a backup. In addition, by exporting a custom screen and then deleting it, you can remove a custom screen from the system without losing it permanently.

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click **Edit Fields** next to the screen to be exported as a template. The Custom Staff Screen Fields: [Name] page appears.
5. Click **Export this screen as a template**. The File Download dialog appears.
6. Select **Save this file to disk**.
7. Click **OK**. The Save As dialog appears.
8. Select a file location.
9. Click **Save**. The custom screen saves as a template, and the Custom Staff Screen Fields: [Name] page appears.

Daily Time Exclusion Administrator Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

Certain states require that, in specific circumstances, lunchtime and passing time between scheduled periods must be deducted from those attendance minutes that count towards the average daily attendance (ADA) to be claimed for funding from the state. PowerSchool supports the deduction of these minutes through functionality known as daily time exclusion (DTE).

Getting Started

To get started and begin taking advantage of DTE, perform the following tasks to set up and use this feature:

- *Specify Attendance Preferences*
- *Set Up Attendance Conversions*
- *Set Up Bell Schedule*
- *Define Bridge Period*
- *Define Lunch Period*
- *Set Passing Time*
- *Exclude from Attendance Calculation*
- *Schedule Students into Excluded Section*
- *Take Attendance for Excluded Section*
- *Update Attendance Views*
- *Recalculate Daily Attendance*

Note: See respective sections within PowerSchool online help for standard information and procedures.

Administration

Specify Attendance Preferences

To utilize DTE, you must use the daily method of recording attendance. Meeting attendance may also be used in conjunction with daily attendance. Using both methods is especially helpful for those schools with block schedules in which students move between classes and each teacher must record absences and tardies. Through attendance preferences, schools can define whether lunch periods and passing time are included in or excluded from the calculated ADA minutes.

The following example schedule represents an elementary, closed campus school:

Period	Time
Morning	8 to 11 a.m.
Lunch	11:10 a.m. to 12:00 p.m.
Afternoon	12:10 to 2 p.m.

In this example, lunch is scheduled as a separate period, as are the morning and afternoon periods. Courses are set up to represent morning, lunch, and afternoon classes. Sections for these courses are scheduled, and students are enrolled in these sections. When the teacher takes attendance during the morning period, PowerSchool evaluates each student’s schedule and calculates attendance as:

Time	Attendance Minutes
8 to 11 a.m.	180
12:10 to 2 p.m.	110
	Total = 290

Note that the lunch period is not included in the total attendance minutes.

Set the attendance preferences to exclude lunch periods and passing time so that PowerSchool excludes these times when attendance is recorded. The calculation determines passing time by investigating the student's schedule to find the periods in which the student is scheduled. PowerSchool then investigates the bell schedule to determine whether any passing time between the periods exists. For more information, see *Set Passing Time*.

How to Specify Attendance Preferences

Note: If your school currently uses the daily attendance method, see *Set Up Attendance Conversions* for information on updating your system to use DTE.

Note: For more information, see *Attendance Preferences*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Preferences**. The Attendance Preferences page appears.
3. Use the following table to enter DTE information:

Field	Description
Attendance recording methods	Select the **Daily** checkbox to record attendance by day for this year. **Note:** If you want to use another attendance method in conjunction with daily, select the appropriate checkboxes that apply (any combination of the four options is valid): • **Meeting** to record attendance by meeting for this year. • **Time** to record attendance this year by entering a time value. • **Interval** to record attendance this year according to a specified time interval.
Default attendance page	Choose **Daily** from the pop-up menu.

Meeting and daily attendance bridge	Select the **Two-way, keep records in sync** option. **Note:** This option ensures that when a teacher enters attendance during the period defined as the daily attendance bridge period (defined in the bell schedule set up of periods), the attendance is reflected in both the daily attendance as well as the meeting attendance. It also ensures that when the attendance administrator updates daily attendance, the change is updated to the teacher's attendance page. This synchronization only occurs for the period defined as the bridge period. If you are using both meeting and daily attendance methods, set separate meeting and daily attendance bridges. If you do not want to impact the teacher's attendance page, then set this option to **One-way, section to daily attendance**.
Enable ADA Periods and Passing Time Deductions	Select the checkbox to enable ADA Periods and Passing Time Deductions.
Deduct Passing Time	Indicate how you want passing time to be deducted by selecting one of the following options: • Select **No** to only deduct ADA excluded periods and sections. No passing time is deducted. • Select **Yes - All Passing Time** to deduct all passing time from ADA calculation. • Select **Yes - After ADA Excluded Meetings Only** to deduct ADA excluded periods and sections and any passing time that immediately follows until the next included period and section or end of day occurs (whichever comes first). **Note:** For more information on how PowerSchool calculates the passing time, see *Daily Time Exclusion Calculation Rules*.

4. Click **Submit**. The Changes Recorded page appears.

Set Up Attendance Conversions

If your school currently uses the daily attendance method, be sure to define the appropriate time items. For each time item, define the daily attendance value according to the number of minutes present, excluding lunch and passing time according to your school's needs. For detailed information, see *Attendance Conversions*.

Set Up Bell Schedule

Setting up the bell schedule to utilize DTE requires the following:

- Define the bridge period. See *Bridge Period*.
- Identify the start and end times for school when defining the bridge period.

  Note: Any attendance entered before the Default Time In or after the Default Time Out is not included in attendance minutes calculated and stored in PowerSchool.

- Be sure lunch periods are excluded from ADA calculations. See *Exclude Sections from Attendance Calculation*.
- If excluding passing time, be sure that the start and end times for all periods do not include passing time. See *Excluding Passing Time*.

Note: For more information, see *Bell Schedules*.

Define Bridge Period

The bridge period translates the attendance the teacher takes for that period into daily attendance minutes. When the teacher records attendance in the bridge period, daily attendance minutes are recorded. This figure is the maximum number of minutes the student can have for attendance for any given day.

Note: For more information, see *How to Set Up Bell Schedule Items*.

How to Define the Bridge Period

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click **Edit Schedule** next to the bell schedule you are working with. The Bell Schedule: [bell schedule] page appears.
4. Click the period number for the bell schedule item you want to edit. The Edit Bell Schedule Item page appears.
5. Use the following table to edit information in the fields:

Field	Description

Period	Choose the bridge period from the pop-up menu.
Start Time	Enter a start time for the period. Indicate if it is AM or PM.
End Time	Enter a finish time for the period. Indicate if it is AM or PM.
Counts for ADA	Select the checkbox to count this bell schedule item in average daily attendance calculations.
Use For Daily Attendance	Select the checkbox to use daily attendance for this bell schedule item. If you select the checkbox, enter the start and end times that will be used to calculate daily attendance.

6. Click **Submit**. The Bell Schedule: [bell schedule] page displays the new bell schedule item.

Define Lunch Period

Create and schedule lunch periods so PowerSchool knows when to exclude the total lunch period time from the attendance calculation. Time for lunch can only be excluded if the period and/or section is excluded from ADA. Create one lunch course and as many sections of lunch as are necessary to fulfill your school's lunch requirements. If students go to lunch during different periods, then create a section for each of these periods. For more information, see *New Courses* and *Sections*.

Set Passing Time

If attendance preferences are set to exclude passing time between periods, the passing time between periods is deducted. If there are no time gaps between the periods, then no time is deducted between periods. The following example shows a schedule that does not include passing time:

Period	**Time**	**Attendance Calculation**
1 – Attendance	8 to 8:10 a.m.	10 minutes

2 – Math	8:15 to 9:30 a.m.	75 minutes
3 – Science	9:35 to 10:50 a.m.	75 minutes
4 – English	10:55 a.m. to 12:10 p.m.	75 minutes
Lunch	12:15 to 12:45 p.m.	0 minutes
5 – Music	12:50 to 2:05 p.m.	75 minutes
6 – PE	2:10 to 3:25 p.m.	75 minutes
		Total = 385

Note: For more information about bell schedule items, see *How to Set Up Bell Schedule Items*.

Exclude from Attendance Calculation

The ADA calculation inspects each section in which a student is enrolled to verify if it is marked as being excluded from the attendance calculation. If periods and sections are to be excluded from ADA (or count for ADA), the fields controlling inclusion/exclusion need to be set for each period and section. The intent of having both options is to provide some flexibility in accommodating the various types of schedules that are used. Whether the flag on the section or the period is used, students must be enrolled in a lunch section in order for the new ADA calculation to exclude the designated time.

Note: Either a bell schedule period or scheduled section can be marked for exclusion in order for the time to be excluded from the attendance calculation. In order for the meeting minutes to count in the attendance calculation, both the bell schedule period and the scheduled section need to be marked for inclusion.

How to Exclude a Period

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.

3. Click **Edit Schedule** next to the name of the bell schedule you want to edit. The Edit Bell Schedule page appears.
4. Click the period number for the bell schedule item you want to edit. The Bell Schedule: [name] page appears.
5. Deselect the **Counts for ADA** checkbox.
6. Click **Submit**.

How to Exclude a Section

Note: The **Exclude from Attendance** checkbox is also found on the Edit Course District Information page; however, the courses checkbox value is not considered when DTE calculations are made.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. On the School Setup page, click **Sections**.
3. Choose the course name from the courses menu. The course information page appears.
4. Click either the period or the section number in the **Per** and **Sec#** columns. The Edit Section page appears.
5. Select the **Exclude from Attendance** checkbox.
6. Click **Submit**.

Schedule Students into Excluded Section

Schedule students into the defined excluded period or section. To schedule a group of students into a specific excluded section, use the Mass Enroll feature. For more information, see *Mass Enroll in a Class*. Or, schedule students on an individual basis. For more information, see *Add Section Enrollments*.

Take Attendance for Excluded Section

Administrative staff must enter attendance for students who come to school after the attendance period, leave school early, or leave school for an appointment and return later during the same school day. If the student arrives to school after the attendance period, even though a teacher for another period marks the student as present or tardy (if meeting attendance method is used), the student’s minutes will not be calculated and stored for ADA. The attendance administrator must enter the student’s arrival through the New Daily Attendance page. Only attendance taken by the teacher during the period defined as the attendance period calculates the ADA minutes. For more information, see *Daily Attendance*.

Update Attendance Views

A special function allows you to update the attendance views as needed, rather than wait for the nightly process to execute. This same functionality automatically runs as part of the nightly process. This update process recalculates and repopulates the Membership Defaults tables based upon the date ranges you specify.

Note: If Day Part Attendance is enabled, this process recalculates and re-populates the Day Part tables based on the date ranges you specify. For more information, see the *State and Provincial Reporting Day Part Attendance Setup Guide* available on PowerSource.

How to Update Attendance Views

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Function page appears.
2. Under Function, click **Attendance Functions**. The Attendance Functions page appears.
3. Click **Refresh Premier Attendance Views Data**. The Refresh Attendance Views Data Report page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • Select **The selected students only** to run the report for students in the current selection enrolled in the specified date range. • Select **All students** to run the report for all students in the current school enrolled in the specified date range.
Begin Date and Ending Date	Specify the date range in the blank fields using the format mm/dd/yyyy. Since this process must recalculate attendance values, the greater the date ranges specified, the longer the processing time.
Processing Options	To run this report, select a time to start it:

	• Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields.
Specific Date/Time	If you selected **On Specific Date/Time** for **Processing Output**, enter the date to execute the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry. Use the pop-up menus to indicate hour and minute.

5. Click **Submit**. The refresh process begins. A job file is created showing success and failures for each student processed.

   If running the report for students in the current selection, each student appears as a separate line item in the report.

   If running the report for all students in the current school, the report displays one-line item for the school.

6. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.

Recalculate Daily Attendance

Under certain circumstances, you may need to recalculate the daily attendance minutes. These circumstances may include:

- Updating from a previous PowerSchool release.
- Changing the attendance preferences that affect DTE. For more information, see *Specify Attendance Preferences*.

Once this special function is generated, all daily attendance record minutes for each student are updated based on DTE attendance preferences for each school's full year term.

How to Recalculate Daily Attendance Minutes

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Function page appears.
2. Under Function, click **Attendance Functions**. The Attendance Functions page appears.
3. Click **Recalculate Daily Attendance Minutes**. The Recalculate Daily Attendance Minutes page appears.
4. Select the checkbox next to each school name for which you want to recalculate attendance minutes. For more information, refer to the field table in *How to Update Attendance Views*.

   Note: The school context is critical in determining which schools appear on this page. When in district mode, all schools in the district that take daily attendance appear. When in school mode and the school takes daily attendance, the school appears. When in school mode and the school does not take daily attendance, the school does not appear.

5. Click **Submit**. The daily attendance minutes are updated.

Reports

All ADA and ADM reports take into account the exclusion of lunch and passing time as appropriate. These reports should be run using the daily attendance mode and the time-to-day conversion option. For more information on these reports, see *Membership Reports*.

Daily Time Exclusion Calculation Rules

The following rules apply only if a student is enrolled in at least one local class for any attendance date. If all periods are remote or unscheduled in PowerSchool, the student receives zero attendance minutes for the day, since they are not at the assigned school on that date.

Attendance calculations are dependent on the following:

<table>
<tr><th>Dependency</th><th>Description</th></tr>
<tr><td>Bell schedule (for each day based on the school calendar).</td><td>Bridge period time range (the maximum daily attendance minutes possible). Any scheduled time outside of the bridge period start and end times are ignored and do not apply to the total minutes.
Period time lengths.
Time gaps (if any) between the periods.
ADA exclusion setting.
Overlapping bell schedule periods are not supported within one bell schedule</td></tr>
<tr><td>Student schedule.</td><td>Assigned school enrollments on a given day.
Remote section enrollments.
Unscheduled periods.
Sections excluded from ADA.

Note: Double-booked and overlapping student enrollments are not supported.</td></tr>
<tr><td>Deduct Passing Time attendance preference setting.</td><td>If Deduct Passing Time preference is set to No:
The only deductions that are made are for ADA-excluded periods and sections if a student is enrolled locally in that section.
No deductions are made for passing time, which includes the time for unscheduled periods, remote sections, and time outside of student scheduled time that is within the bridge period time range.
If Deduct Passing Time preference is set to Yes - After All Meetings:</td></tr>
</table>

<table>
<tr><td></td><td>

All ADA excluded periods and sections are deducted from the attendance calculation.
All unscheduled periods are deducted (considered as passing time) from the attendance calculation.
All remote sections are deducted (considered as passing time) from the attendance calculation.
All passing time is deducted (gaps between periods) from the attendance calculation.
Time outside student-scheduled time that is within the bridge period time range is deducted from the attendance calculation.

If Deduct Passing Time attendance preference is set to Yes - After ADA Excluded Meetings Only:

Only excluded periods and sections and any immediately following passing time is deducted (time gaps, unscheduled periods, and remote sections).
All deducted time must be either an ADA excluded period or section, passing time, or unscheduled or remote periods in a contiguous unbroken manner (all follow one another in sequence in the schedule) until either an ADA included period and section, or the last period is encountered (whichever occurs first).

Note: ADA exclusion is not applicable to a remote section or unscheduled period.

</td></tr>
<tr><td>Daily attendance with and without attendance time records entered directly.</td><td>

If no Time_In/Time_Out values are entered, then the calculations are the same as those for bridged daily attendance.
If any attendance time ranges are entered, they must be within the time range set in the bridge period. PowerSchool alerts users if this is violated.
The calculated time ranges are stored in the fields:

Attendance_Time.Total_Minutes displays the total for just one-time range.
Attendance.Total_Minutes displays the sum of all the Attendance_Time time ranges that are related to

</td></tr>
</table>

	the "parent" attendance table daily attendance record.

Glossary

Term	Description
Bridge Period	A period defined in the bell schedule that, in addition to the period start/end times, contains the school day start/end times. Only one bridge period is allowed per day. Bridge period and times can change daily, dependent on the school calendar and bell schedule setups.
Daily Attendance	Student attendance marks (tardy, absent) and arrival and dismissal times for an entire school day.
Daily Time Exclusion (DTE)	Time that may be deducted from the maximum daily attendance minutes as set in the bridge period. Deductions are allowed for ADA excluded periods and sections and passing time. This only applies to schools that use the daily attendance method.
Entry Point	Where Daily Attendance minutes are calculated in PowerSchool.
Passing Time	Time between periods (if any), time before student's first period and after last period (if any - determined by the bridge period time range), as well as unscheduled and remote scheduled section time (if any - considered to be passing time).
Period	Synonymous with bell schedule time slot (a bell schedule Item record).
Remote section	Course taken outside of a student's assigned school but at the same district.
Section	The scheduled course for a student.

Data Validation Administrator Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool now provides data validation to promote data integrity by preventing invalid data from being entered or imported into PowerSchool. Data validation is automatically enabled and appears throughout PowerSchool for certain Students and Teachers fields. For a detailed list of fields, see the *Appendix*.

Localized versions of PowerSchool support data validation. All dates, numbers, text, and messaging appear in the localized format and all data is validated against applicable rules.

Note: State-specific pages are currently not validated using this new validation capability. Validation of state-specific pages will be implemented in a future version and deployed on a state-by-state basis.

Data Types

PowerSchool supports validation for the following data types:

- Date
- Number
- Text

Rules

PowerSchool supports the following data validation rules:

Rule	Description	Data Type
Exclude Characters	• Enter any characters you want to prevent users from entering in a text field, including alphabetical characters, numbers, and special characters, such as punctuation. • The field level data validation error message remains until a valid field entry is made. • If certain characters have already been excluded in PowerSchool by a system rule, the characters entered here are added to the list of excluded characters. • If the user attempts to submit the page without correcting the error, a page level data validation error	Text

	message appears. For more information, see *Page Submission*.	
Integer	• Only numeric values may be entered as field value.	Number
Maximum Date	• The field value entered must be less than or equal to the maximum date. • If a user attempts to enter a field value greater than the maximum field value allowed, a field level data validation error message appears. • If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	Date
Maximum Length	• The length of characters entered in a field must be less than or equal to the maximum length. • If a user attempts to enter more characters than allowed, the user is prohibited from entering additional characters.	Number Text
Maximum Value	• The field value entered must be less than or equal to the maximum value. • If a user attempts to enter a field value greater than the maximum field value allowed, a field level data validation error message appears. • If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	Number
Minimum Date	• The field value entered must be greater than or equal to the minimum date. • If a user attempts to enter a field value less than the minimum field value allowed, a field level data validation error message appears.	Date

	• If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	
Minimum Length	• The length of characters entered in a field must be greater than or equal to the minimum length. • A user cannot enter a field value less than the minimum length. • If the user exits a field without entering the minimum length, a field level data validation error message appears. • The field level data validation error message remains until the minimum length is entered. • If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	Number Text
Minimum Value	• The field value entered must be greater than or equal to the minimum value. • If a user attempts to enter a field value less than the minimum field value allowed, a field level data validation error message appears. • If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	Number
Required	• A field value must be entered. The field value cannot be whitespace, such as tabs or spaces. • An asterisk appears to the right of the field. • If the user exits a required field without entering a value, a field level data validation error message appears. • The field level data validation error message remains until a valid field entry is made.	Date Number Text

	• If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	
Text Mask	• A field value must be entered in the user-defined format. • The field level data validation error message remains until a valid field entry is made. • If the user attempts to submit the page without correcting the error, a page level data validation error message appears. For more information, see *Page Submission*.	Text

Rules by Data Type

Date

The following table outlines the data validation rules and error messaging for date:

Rule	Description	Error Message
Date Type	The date value entered must be valid.	Not a valid date
Maximum Date	The date value entered must be less than or equal to the maximum value.	Date must be on or before [date]
Minimum Date	The date value entered must be greater than or equal to the minimum value.	Date must be on or after [date]
Required	A field value must be entered. The field value cannot be whitespace, such as tabs or spaces.	Missing required field

Number

The following table outlines the data validation rules and error messaging for number:

Rule	Description	Error Message
Integer	Only numeric values may be entered as field value.	Number must be an integer, containing only numeric characters
Maximum Length	The length of characters entered in a field must be less than or equal to the maximum length.	Number cannot be greater than [#] digits in length
Maximum Value	The field value entered must be less than or equal to the maximum value.	Number cannot be greater than [#]
Minimum Length	The length of characters entered in a field must be greater than or equal to the minimum length.	Number cannot be less than [#] digits in length
Minimum Value	The field value entered must be greater than or equal to the minimum value.	Number cannot be less than [#]
Number Type	The numeric value entered must be valid.	Not a valid number
Required	A field value must be entered. The field value cannot be whitespace, such as tabs or spaces.	Missing required field

Text

The following table outlines the data validation rules and error messaging for text:

Rule	Description	Error Message
Exclude Characters	Characters marked for exclusion may not be entered in a text field.	Text must not contain characters !@#$%'^&*()<>"
Maximum Length	The length of characters entered in a field must be less than or equal to the maximum length.	Text cannot be greater than [#] digits in length
Minimum Length	The length of characters entered in a field must be greater than or equal to the minimum length.	Text cannot be less than [#] digits in length
Required	A field value must be entered. The field value cannot be whitespace, such as tabs or spaces.	Missing required field
Text Mask	A field value must be entered in the user-defined format.	Entries must be unique Set Name cannot start with 'Pearson_ Set Name cannot contain the characters: < > ‘ or ”

Icon Legend

For PowerSchool pages that include the following field icons, a legend appears of the bottom of page indicating each icon used and its meanings. The legend only contains references for validation items on the page. If the page contains no validation items, the legend does not appear.

Icon	Description
*	Required Field
	Date Entry

	Time Entry
	Time Entry (5-minute interval)
	Time Entry (15-minute interval)
	Time Entry (30-minute interval)
	Time Entry (hour only interval)

Data Validation Configuration

Data Validation Rule Status

Using the Data Validation Rule Status page, you can view and edit existing rules, as well as add data validation rules for Students and Teachers standard and database extensions (legacy custom fields).

Note: Certain Students and Teachers fields are pre-configured with system rules.

How to View Data Validation Rule Status

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Data Validation Rule Status page is now also accessible via **Start > System > Page and Data Management > Data Validation Rule Status**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Data Validation Rule Status**. The Data Validation Rule Status page appears.
4. Use the following table to view information on this page:

Field	**Description**
Rule Name	The name of the data validation rule. For more information, see *Rules*.
Invalid Rule	Indicates whether rule is valid or invalid. If the caution icon appears, the rule is invalid and requires editing. **Note:** This column is only visible if there are invalid user rules that conflict with system rules. A user rule may be considered invalid if it is less restrictive than a system rule.
User Rules	Indicates if a rule is enabled/applied by the district.

System Rules	Indicates if rule is enabled/applied by the system (pre-configured by PowerSchool).

How to Add a Data Validation Rule

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Data Validation Rule Status page is now also accessible via **Start > System > Page and Data Management > Data Validation Rule Status**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Data Validation Rule Status**. The Data Validation Rule Status page appears.
4. Click **Add**. The Add Data Validation Field appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Table	Choose the PowerSchool table you want to add the field to from the pop-up menu: • **Students** • **Teachers**
Field Name	Click **Choose Fieldname** to select a Students or Teachers field. **Note:** Do not select a Students or Teachers field that has already been defined with validation rules. If you do, an error message will appear upon submitting. Instead, edit the existing rule.
Type	Choose the rule data type from the pop-up menu: • **Text** • **Date**

	• **Number** The selected data type determines the rules that may be applied to the selected field.

6. Click **Submit**. The Add/Edit Data Validation Rules page appears.
7. Use the following table to enter a valid value for each **User Value** you want to edit:

   Notes:

   - Only certain rule types appear editable based on the data **Type** of the selected field/rule and whether a system rule already exists.
   - If a system value already exists, only a more restrictive user value may be defined.
   - If a system value already exists for Minimum Length, Minimum Date, or Minimum Number, the user value may not be less than the system-defined minimum.
   - If a system value already exists for Maximum Length, Maximum Date, or Maximum Number, the user value may not be greater than the system-defined maximum.

Field	**Description**
Excluded Characters	Enter any characters you want to prevent users from entering in a text field, including alphabetical characters, numbers, and special characters, such as punctuation. **Note:** If certain characters have already been excluded in PowerSchool by a system rule, the characters entered here are added to the list of excluded characters.
Integer	Select the checkbox to indicate only numeric values may be entered as field value. This will prevent entry of decimal numbers. **Note:** This checkbox may not be disabled if already set at the system level.
Maximum Date	Indicate the maximum date that may be entered in this field by doing one of the following:

	• Enter the specific date. • Choose a date from the **By Reference** pop-up menu. **Note:** The **By Reference** pop-up only appears if you are adding/editing a maximum date rule to a Students field.
Maximum Length	Enter the maximum numbers of characters that may be entered in this field.
Maximum Number	Enter the maximum numeric value that may be entered in this field.
Minimum Date	Indicate the minimum date that may be entered in this field by doing one of the following: • Enter the specific date. • Choose a date from the **By Reference** pop-up menu. **Note:** The **By Reference** pop-up only appears if you are adding/editing a minimum date rule to a Students field.
Minimum Length	Enter the minimum numbers of characters that may be entered in this field.
Minimum Number	Enter the minimum numeric value that may be entered in this field.
Required	Select the checkbox to indicate a non-blank value must be entered. **Note:** This checkbox may not be disabled if already set at the system level.
Text Mask	Choose the appropriate text mask set from the pop-up menu.

8. Click **Submit**. A confirmation message appears.

Note: If there are any data validation errors, an orange warning message appears at the top of the page indicating that the information could not be saved, each type of error encountered and the number of occurrences of each error.

How to Edit a Data Validation Rule

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Data Validation Rule Status page is now also accessible via **Start > System > Page and Data Management > Data Validation Rule Status**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Data Validation Rule Status**. The Data Validation Rule Status page appears.

   Note: A PowerSchool-defined system rule may not be editable. If a rule is not editable, the Edit (pencil) icon appears as shaded. When clicked, information is read-only.

4. Click the Rule Name you want to edit. The Add/Edit Data Validation Rules page appears.

   Note: If a PowerSchool-defined system rule is not editable, a Lock (padlock) icon appears next to the Rule Name.

5. Enter a valid value for each **User Value** you want to edit. For detailed information, see Step 7 of *How to Add a Data Validation Rule*.
6. Click **Submit**. A confirmation message appears.

   Note: If there are any data validation errors, an orange warning message appears at the top of the page indicating that the information could not be saved, each type of error encountered and the number of occurrences of each error.

How to Delete a Data Validation Rule

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Data Validation Rule Status page is now also accessible via **Start > System > Page and Data Management > Data Validation Rule Status**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Data Validation Rule Status**. The Data Validation Rule Status page appears.

   Note: A PowerSchool-defined system rule may not be editable. If a rule is not editable, the Edit (pencil) icon appears as shaded. When clicked, information is read-only.

4. Click the Rule Name you want to delete. The Add/Edit Data Validation Rules page appears.

   Note: If a PowerSchool-defined system rule is not editable, a Lock (padlock) icon appears next to the Rule Name.

5. Click **Delete**.

   Note: The **Delete** button does not display for fields associated with a system rule.

6. Click **Confirm Delete**. The Data Validation Rule Status page displays a confirmation message.

Manage Text Mask Sets

Using the Text Mask Administration page, you can define your own patterns of letters, numbers, and other characters as user-defined text masks. Fields that have text masks associated to them are validated upon submitting a page that contains those fields. If an error occurs, a field level message appears indicating the correct format to be used, such as (###) ###-####.

Text mask sets may also be used to validate field entry against a specific series of values, such M and F for validating data entry of gender.

How to Add a Text Mask Set

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Text Mask Administration page is now also accessible via **Start > System > Page and Data Management > Text Mask Administration**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Text Mask Administration**. The Text Mask Administration page appears.
4. Click **Add Set**. The Add/Edit Text Mask Set page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Set Name	Enter the name for the text mask set, such as Phone Number.
Validation Feedback Hint	Enter the allowed text mask formats, which will be used in error messaging, such as (###) ###-####.
Format / Value	Enter the text mask format, such as (###) ###-####. The text mask format can be made up of a series of character placeholders, including: • # - Number placeholder • @ - Alpha placeholder (any non-number) • * - Any number of any character • \ - Escape character (to allow for use of placeholder characters as literals) • Use any other literal character as a delimiter. To add another Format/Value, click the **Add Row** (+) icon. For example, if adding acceptable formats for Phone Number, you may want to also add ###-###-####. To delete a Format/Value, click the **Delete Row** (-) icon. You may also add specific values to a text mask set without using placeholder characters to restrict form entry or imports to a specific set of values. This can be useful to add import validation

	to certain fields normally displayed as a pop-up menu with a specific set of options.

6. Click **Submit**. The Text Mask Administration page displays a confirmation message.

   Note: If there are any data validation errors, an orange warning message appears at the top of the page indicating that the information could not be saved, each type of error encountered and the number of occurrences of each error.

How to Edit a Text Mask Set

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Text Mask Administration page is now also accessible via **Start > System > Page and Data Management > Text Mask Administration**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Text Mask Administration**. The Text Mask Administration page appears.
4. Click the name of the Text Mask Set you want to edit. The Add/Edit Text Mask Set page appears.
5. Edit information as needed. For field descriptions, see *How to Add a Text Mask Set*.
6. Click **Submit**. The Text Mask Administration page displays a confirmation message.

   Note: If there are any data validation errors, an orange warning message appears at the top of the page indicating that the information could not be saved, each type of error encountered and the number of occurrences of each error.

How to Delete a Text Mask Set

Note: To access this page, **District Office** must be selected from the **School** pop-up menu in the navigation toolbar.

Note: The Text Mask Administration page is now also accessible via **Start > System > Page and Data Management > Text Mask Administration**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Field Validation Rules, click **Text Mask Administration**. The Text Mask Administration page appears.
4. Click the **Delete** button next to the name of the Text Mask Set you want to delete. The Text Mask Administration page displays a confirmation message.

   Note: The **Delete** button does not display for text mask sets that are being referenced by existing rules.

Run the Data Validation Report

Using the Data Validation Report, you can easily identify which Students and Teachers records within a selection do not meet current data validation requirements.

How to Run the Data Validation Report for Teachers

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Data Validation Report**. The Data Validation Report Parameters page appears.
4. Use the following table to enter information in the fields:

Field	Description
Current Selection	Indicates you are running the report for Teachers.
Records in Selection	Indicates the number of teachers for which you are running the report.
Version	The version number of the report.
Description	A detailed description of the report.
Scan the following fields	Select the fields you want to scan in the **Scan the following fields** list.

	Note: Only fields with validation rules will appear in the list. Field names are not localized and displayed as they exist in the database.

5. Click **Run Report**. The Data Validation Report Results page displays the following information:

Field	Description
Name	The teacher's name. Click to open the teacher's record in another tab/window. **Note:** The page to display is the last page you viewed when you last accessed the teacher's record.
Teacher Number	The teacher's identification number.
Fields Containing Invalid Data	The fields containing invalid teacher data.

6. Click **Make Current Selection** to select all teachers in the report. The Group Staff Functions page appears.

How to Run the Data Validation Report for Students

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Data Validation Report**. The Data Validation Report page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Current Selection	Indicates you are running the report for Students.
Records in Selection	Indicates the number of students for which you are running the report.
Version	The version number of the report.
Description	A detailed description of the report.
Scan the following fields	Select the fields you want to scan in the **Scan the following fields** list. **Note:** Only fields with validation rules will appear in the list. Field names are not localized and displayed as they exist in the database.

5. Click **Run Report**. The Data Validation Report Results page displays the following information:

Field	Description
Name	The student's name. Click to open the student's record in another tab/window. **Note:** The page to display is the last page you viewed when you last accessed the student's record.
Student Number	The student's identification number.
Fields Containing Invalid Data	The fields containing invalid student data.

6. Click **Make Current Selection** to select all students in the report. The Group Student Functions page appears.

Working With Data Validation

Auto COMM

When data is imported into the Students or Teachers table using the AutoComm function, it is validated against applicable data validation rules. When the AutoComm function runs, the system emails the recipient the status of the AutoComm process if an email address is specified in the **E-Mail completion report to** field. Successful AutoComm runs can contain up to 100 Error messages for records that failed to import due to validation issues. Unsuccessfully imported records are not updated during the AutoComm import. If a record was not imported due to a data validation error, the message "Error on line [#]: Validation error for field: [field name]" appears along with one or more of the following explanations:

- Empty value is not allowed
- Value may not contain more than [#] character(s)
- Value must be a number
- Value must be a valid date
- Value must be an integer
- Value must be at least [#]
- Value must be less than or equal to [#]
- Value must be on or after [date]
- Value must be on or before [date]
- Value must contain at least [#] character(s)

Note: If a record was unsuccessfully imported due to a data validation, the system does not attempt routine validation until the data validation is corrected.

For the import status on unsuccessful records, see the system log. Review the details about each error, make any necessary corrections, and then run the AutoComm function again. Continue this process until all files are imported.

Page Submission

Fields that have data validation rules associated to them are validated against those rules upon submitting a page that contains those fields. Upon submitting a page, the following occurs:

- If there are any data validation errors, a warning message appears at the top of the page indicating that the information could not be saved, each type of error encountered and the number of occurrences of each error, for example:

Information was not submitted. Please see error messages on the page and correct before submitting again.
Number cannot be less than [#] - (X)
Number must be at least [#] digits in length - (Y)
Date must be on or after [date] - (Z)

Note: Where X, Y and Z are the count of the number of occurrences of that error on the page.

- A message appears next to each field where a data validation error occurred indicating a correction needs to be made. For more information, see *Rules by Data Type*.
- When updating fields that need to be corrected, the orange warning message that appears at the top of the page scrolls with the user as the user corrects each field.
- When updating fields that need to be corrected, data validation error messages remain until a valid entry is made. For more information, see *Rules by Data Type*.
- Once all data validation errors are corrected, the orange warning message then appears green indicating that the information is now valid and can be saved.

Quick Import

Data that is imported into the Students or Teachers table using the Quick Import function is validated against applicable data validation rules. The results page displays both successfully and unsuccessfully imported records. Unsuccessfully imported records are not updated during the import. If a record was not imported due to a data validation error, the message "Not imported: Validation error for field: [field name]" appears along with one or more of the following explanations:

- Empty value is not allowed
- Value may not contain more than [#] character(s)
- Value must be a number
- Value must be a valid date
- Value must be an integer
- Value must be at least [#]
- Value must be less than or equal to [#]
- Value must be on or after [date]
- Value must be on or before [date]
- Value must contain at least [#] character(s)

Note: If a record was unsuccessfully imported due to a data validation, the system does not attempt routine validation until the data validation is corrected.

Review the details about the error, make any necessary corrections, and then import again. Continue this process until all records are imported.

Troubleshooting

If it becomes necessary to disable data validation, contact PowerSchool Technical Support.

Appendix

Students Table

PowerSchool includes data validation for the following Students table fields:

Note: For more information about the Students table, see the *PowerSchool Data Dictionary Tables* available on PowerSource.

ALERT_DISCIPLINEEXPIRES	GUARDIAN_STUDENTCONT_GUID
ALERT_GUARDIANEXPIRES	HOME_PHONE
ALERT_MEDICALEXPIRES	HOME_ROOM
ALERT_OTHEREXPIRES	HOUSE
ALLOWWEBACCESS	LASTFIRST
APPLIC_RESPONSE_RECVD_DATE	LAST_NAME
APPLIC_SUBMITTED_DATE	LOCKER_COMBINATION
BUILDING	LOCKER_NUMBER
BUS_ROUTE	LUNCH_ID
BUS_STOP	MAILING_CITY
CAMPUSID	MAILING_GEOCODE
CITY	MAILING_STATE
CLASSOF	MAILING_STREET
DISTRICTENTRYDATE	MAILING_ZIP
DISTRICTENTRYGRADELEVEL	MIDDLE_NAME
DISTRICTOFRESIDENCE	MOTHER
DOB	PHONE_ID
DOCTOR_NAME	SCHED_NEXTYEARBUILDING
DOCTOR_PHONE	SCHED_NEXTYEARGRADE
EMERG_CONTACT_1	SCHED_NEXTYEARHOMEROOM
EMERG_CONTACT_2	SCHED_NEXTYEARHOUSE
EMERG_PHONE_1	SCHED_NEXTYEARTEAM
EMERG_PHONE_2	SCHED_PRIORITY
ENROLLMENTCODE	SCHED_YEAROFGRADUATION
ENROLLMENTID	SCHOOLENTRYDATE
ENROLLMENTTYPE	SCHOOLENTRYGRADELEVEL
ENROLLMENT_SCHOOLID	SCHOOLID
ENROLLMENT_TRANSFER_DATE_PEND	SSN
ENROLL_STATUS	STATE
ENTRYCODE	STATE_STUDENTNUMBER
ENTRYDATE	STREET
EXITCODE	STUDENT_ALLOWWEBACCESS

EXITDATE	STUDENT_NUMBER
FAMILY_IDENT	STUDENT_WEB_ID
FATHER	SUMMERSCHOOLNOTE
FEDRACEDECLINE	TEAM
FEE_EXEMPTION_STATUS	TRACK
FIRST_NAME	TUITIONPAYER
FTEID	WEB_ID
GENDER	WITHDRAWAL_REASON_CODE
GEOCODE	WM_ADDRESS
GPENTRYYEAR	WM_CREATEDATE
GRADE_LEVEL	WM_STATUS
GRADREQSET	WM_STATUSDATE
GRADUATED_RANK	WM_TA_DATE
GRADUATED_SCHOOLID	WM_TA_FLAG
GRADUATED_SCHOOLNAME	WM_TIER
GUARDIANFAX	ZIP

Teachers Table

PowerSchool includes data validation for the following Teachers table fields:

Note: For more information about the Teachers table, see the *PowerSchool Data Dictionary Tables* available on PowerSource.

ADMINLDAPENABLED	SCHED_HOMEROOM
BALANCE1	SCHED_HOUSECODE
BALANCE2	SCHED_MAXIMUMCONSECUTIVE
BALANCE3	SCHED_MAXIMUMCOURSES
BALANCE4	SCHED_MAXIMUMDUTY
CITY	SCHED_MAXIMUMFREE
DOB	SCHED_MAXPERS
EMAIL_ADDR	SCHED_MAXPREPS
ETHNICITY	SCHED_PRIMARYSCHOOLCODE
FEDETHNICITY	SCHED_TEAM
FEDRACEDECLINE	SCHED_TOTALCOURSES
FIRST_NAME	SCHOOLID
GRADEBOOKTYPE	SCHOOL_PHONE
GROUP	SIF_STATEPRID
HOMEROOM	SSN
HOME_PHONE	STAFFPERS_GUID

LASTFIRST	STAFFSTATUS
LASTMEAL	STATE
LAST_NAME	STATUS
LOGINID	STREET
LUNCH_ID	SUPPORTCONTACT
MAXIMUM_LOAD	TEACHERLDAPENABLED
MIDDLE_NAME	TEACHERLOGINID
NAMEASIMPORTED	TEACHERLOGINPW
NOOFCURCLASSES	TEACHERNUMBER
NUMLOGINS	TITLE
PASSWORD	WM_ADDRESS
PERIODSAVAIL	WM_ALIAS
PHOTO	WM_CREATEDATE
POWERGRADEPW	WM_EXCLUDE
PREFERREDNAME	WM_PASSWORD
PSACCESS	WM_STATUS
SCHED_ACTIVITYSTATUSCODE	WM_STATUSDATE
SCHED_BUILDINGCODE	WM_TA_DATE
SCHED_CLASSROOM	WM_TA_FLAG
SCHED_DEPARTMENT	WM_TIER
SCHED_GENDER	ZIP

Database Extensions (Legacy Custom Fields)

PowerSchool includes data validation for the following Students database extensions (legacy custom fields):

DATEOFENTRYINTOUSA
IPT_ORAL_CURDATE
IPT_ORAL_ORIGDATE
IPT_READING_CURDATE
IPT_READING_ORIGDATE
IPT_WRITING_CURDATE
IPT_WRITING_ORIGDATE

Federal Race and Ethnicity Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

With the introduction of Federal Ethnicity and Race Management, PowerSchool now provides a tool to assist your school district with collecting individual student and staff level ethnicity and race data, and in reporting aggregated data as required by the new Federal Ethnicity and Race Categories from the U.S. Department of Education.

Note: The legacy ethnicity fields used in scheduling and preconfigured (non state-specific) system reports have been renamed **Scheduling/Reporting Ethnicity** for students and **Reporting Ethnicity** for staff. Please continue to populate these fields for the purpose of scheduling and generating preconfigured system reports. For more information, see *Scheduling/Reporting Ethnicity Codes*.

State Reporting Setup

Refer to your state-specific Tech Notes available on PowerSource for information on state-specific federal ethnicity and race setup based upon each state's requirements. Setup templates have been provided for states that have finalized requirements for the reporting of federal ethnicity and race information. PowerSchool state-specific reports will use setup information to report federal ethnicity and race information for students and/or staff members as required by your state. If your state has not provided final requirements on the reporting of federal ethnicity and race, templates will not be provided, and it is recommended that you do not set up federal ethnicity and race at this time.

Before setting up federal ethnicity and race settings, you must read the *[Your State] District Setup of Federal Ethnicity and Race Settings* article, available on PowerSource by navigating to **Home > PowerSchool > Knowledgebase > State-Specific Reporting > [Your State] > Solutions & Resources**.

Federal Ethnicity

As the first part of a two-part question that appears on the student General Demographics page and the staff Edit Information page, students and staff members are asked to choose an ethnicity (Hispanic or Latino or not Hispanic or Latino).

Enable/Disable the Ethnicity Decline to Specify Setting

Using the Ethnicity Decline to Specify setting, you can indicate whether or not you want to permit students and staff members to be able to decline specifying their ethnicity.

Note: For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

How to Enable/Disable the Ethnicity Decline to Specify Setting

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Do one of the following:
    - Select the Ethnicity Decline to Specify **Allow / Label** checkbox to include an option on permitting students and staff members to decline specifying their ethnicity and then enter the text that you want to appear next to the option. As an example, the text **Decline to Specify Ethnicity** appears the first time you navigate to this page.
    - Deselect the Ethnicity Decline to Specify **Allow / Label** checkbox to not include an option permitting students and staff members to decline specifying their ethnicity.
4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

Federal Race Categories

As the second part of a two-part question that appears on the student General Demographics page and the staff Edit Information page, students and staff members may be asked to choose one or more races, such as:

- (A) Asian
- (B) Black or African American
- (I) American Indian or Alaska Native
- (P) Native Hawaiian or Other Pacific Islander
- (W) White

Federal race categories must either be imported or manually entered. Once federal race categories are defined, indicate the sort order in which you want each federal race category to display relative to other federal race categories.

Note: For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Import Federal Race Categories

During the initial setup of federal ethnicity and race, use the Quick Import function to transfer federal race categories into the PowerSchool Federal Race Categories table. The import file must include the following columns: Name (FederalCode), Value (Description), and SortOrder. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Add a Federal Race Category

Use the following procedure to create new federal race categories.

How to Add a Federal Race Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.

3. Under Federal Race Categories, click **New**. The Edit Federal Race Category page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the federal race category code, such as A.
Description	Enter a description of the federal race category code, such as (A) Asian.

5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the new federal race category

Sort Federal Race Categories

Use the following procedure to indicate the order in which you want each federal race category to display relative to other federal race categories. The lower the sort order number, the higher the federal race category appears in the Race section of the student General Demographics or staff Edit Information page. Federal race categories that have only one district race code associated to them appear higher than federal race categories that have multiple district race codes.

Note: You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the first one created precedes the other.

How to Sort Federal Race Categories

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Enter a number in the respective **Sort** fields.
4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

Edit a Federal Race Category

Use the following procedure to edit existing federal race categories.

How to Edit a Federal Race Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under Federal Race Categories, click the code or description of the federal race category you want to edit. The Edit Federal Race Category page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Federal Race Category*.
5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the edited federal race category.

Delete a Federal Race Category

Use the following procedure to delete existing federal race categories.

How to Delete a Federal Race Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under Federal Race Categories, click the code or description of the federal race category you want to delete. The Edit Federal Race Category page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Enable/Disable the Race Decline to Specify Setting

Using the Race Decline to Specify setting, indicate whether or not you want to permit students and staff members to be able to decline specifying their race.

How to Enable/Disable the Race Decline to Specify Setting

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Do one of the following:
    - Select the Race Decline to Specify **Allow / Label** checkbox to include an option on permitting students and staff members to decline specifying their race and then enter the text that you want to appear next to the option. As

an example, the text **Decline to Specify Race** appears the first time you navigate to this page.

- Deselect the Race Decline to Specify **Allow / Label** checkbox to not include an option permitting students and staff members to decline specifying their race.

4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

District Race Codes

In order for a federal race category to appear on the student General Demographics page and the staff Edit Information page, at least one district race code must be defined for that federal race category. For example, if the federal race category of (A) Asian is defined, the district race code of (A) Asian must also be defined. If multiple district race codes are defined within a single federal race category, they will appear grouped together on the student General Demographics page and the staff Edit Information page. If no district race codes are defined within a particular federal race category, that category will not appear on the student General Demographics page and the staff Edit Information page.

District race codes may be imported when importing federal race categories or they can be manually entered. Once district race codes are defined, indicate the sort order in which you want each district race code to display relative to other district race codes for a given federal ethnicity category.

Note: For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Import District Race Codes

During the initial setup of federal ethnicity and race, use the Quick Import function to transfer district race codes into the PowerSchool Race Codes table. The import file must include the following columns: Name (RaceCode), Value (FederalCode), ValueT (Description), Value2 (AltRaceCode), and SortOrder. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Add a District Race Code

Use the following procedure to create new district race codes.

How to Add a District Race Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.

3. Under District Race Codes, click **New**. The Edit District Race Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the district race code, such as A.
Description	Enter a description for the district race code, such as (A) Asian.
Federal Category	Choose the federal category you want to associate to the district race code, such as (A) Asian.
Alt Race Code	If you want to associate alternate district race codes with PowerSchool district race codes, you will need to map the codes appropriately. If you are using this field to associate SIF ethnicity codes with PowerSchool district race codes, you will need to obtain the SIF ethnicity codes using the *Race External Code Set* section in the *Schools Interoperability Framework™ Implementation Specification 2.0r1* document available at http://specification.sifinfo.org/Implementation/2.0r1/index.html. Once you have obtained the SIF ethnicity codes, enter the appropriate SIF ethnicity code. For more information about SIF, visit PowerSource.

5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the new district race code.

Sort District Race Codes

Use the following procedure to indicate the order in which you want each district race code to display relative to other district race codes within that federal race category. The lower the sort order number, the higher the district race code appears in its respective federal category group in the Race section of the student General Demographics or staff Edit Information page.

Note: You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the first one created precedes the other.

How to Sort District Race Codes

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Enter a number in the respective **Sort** fields.
4. Click **Submit**. The Federal Ethnicity and Race Settings page refreshes.

Edit a District Race Code

Use the following procedure to edit existing district race codes.

Note: Student or staff records are not updated when editing district race codes.

How to Edit a District Race Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under District Race Codes, click the code, description, or category of the district race code you want to edit. The Edit District Race Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a District Race Code*.
5. Click **Submit**. The Federal Ethnicity and Race Settings page displays the edited district race code.

Delete a District Race Code

Use the following procedure to delete existing district race codes.

Note: Student or staff records are not updated when deleting district race codes.

How to Delete a District Race Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Federal Ethnicity and Race Settings**. The Federal Ethnicity and Race Settings page appears.
3. Under District Race Codes, click the code, description, or category of the district race code you want to delete. The Edit District Race Code page appears.

4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Scheduling/Reporting Ethnicity Codes

In addition to the federal ethnicity and race that appears on the student General Demographics page and the staff Edit Information page, students and staff members are also asked to choose a scheduling/reporting ethnicity. Scheduling/reporting ethnicity codes are used to collect individual student and staff level ethnicity data to be used in scheduling and preconfigured reporting.

Note: For information about setting up federal ethnicity categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.

Add a Scheduling/Reporting Ethnicity Code

Use the following procedure to create new scheduling/reporting ethnicity codes.

How to Add a Scheduling/Reporting Ethnicity Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Scheduling/Reporting Ethnicity Codes**. The Scheduling/Reporting Ethnicity Codes page appears.
3. Click **New**. The New Scheduling/Reporting Ethnicity Codes page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the ethnicity code.
Description	Enter a description for the code.
SIF Ethnicity Code	If you want to associate SIF ethnicity codes with PowerSchool ethnicity codes, you will need to map the codes appropriately. To obtain SIF ethnicity codes, see the *Race External Code Set* section in the *Schools Interoperability Framework™ Implementation Specification 2.0r1* document available at http://specification.sifinfo.org/Implementation/2.0r1/index.html. Once you have obtained the SIF ethnicity codes, enter the appropriate SIF ethnicity code.

	For more information about SIF, visit PowerSource.

5. Click **Submit**. The Ethnicity Codes page displays the new ethnicity code.

Edit a Scheduling/Reporting Ethnicity Code

Use the following procedure to edit existing scheduling/reporting ethnicity codes.

How to Edit a Scheduling/Reporting Ethnicity Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Scheduling/Reporting Ethnicity Codes**. The Scheduling/Reporting Ethnicity Codes page appears.
3. Click the ethnicity code or description you want to edit. The Edit Scheduling/Reporting Ethnicity Codes page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Scheduling/Reporting Ethnicity Code*.
5. Click **Submit**. The Ethnicity Codes page displays the edited ethnicity code.

Delete a Scheduling/Reporting Ethnicity Code

Use the following procedure to delete existing scheduling/reporting ethnicity codes.

How to Delete a Scheduling/Reporting Ethnicity Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Scheduling/Reporting Ethnicity Codes**. The Scheduling/Reporting Ethnicity Codes page appears.
3. Click the ethnicity code or description you want to delete. The Edit Scheduling/Reporting Ethnicity Codes page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Student Ethnicity and Race Information

Once federal ethnicity and race is setup, as well as scheduling/reporting ethnicity, you can then import or manually enter student ethnicity and race data.

Import Student Races

During the initial setup of federal race and ethnicity, use the Quick Import function to transfer student race codes into the PowerSchool Student Races table. The import file must include the following columns: RaceCd and Student_Number. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Enter Ethnicity and Race Information for a Group of Students

During the initial setup of federal race and ethnicity, use the Student Field Value function to assign a scheduling/reporting ethnicity to a group of students. For general information, see *Student Field Value*. For state-specific federal ethnicity and race information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Enter Ethnicity and Race Information for an Individual Student

Use the following procedure to enter ethnicity and race information for the selected student.

How to Enter Ethnicity and Race Information for an Individual Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Demographics** from the student pages menu. The General Demographics page appears.
3. Use the following table to edit information in the fields:

Field	Description

Ethnicity	Specify whether or not the student is Hispanic or Latino by selecting the appropriate option. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Race	Specify the student's race by selecting the appropriate checkboxes. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Scheduling/Reporting Ethnicity	Specify the student's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.

4. Click **Submit**. The Changes Recorded page appears, unless the modified information matches another student's information in one or more of the following fields:
   - Name
   - Student Number
   - School
   - Enroll Status
   - Family ID
   - Student Phone
   - Physical Address
   - Mother's Name
   - Father's Name
   - Guardian's Name
   - Any shared fields that were modified, noted with an "x." When updating linked students, you are updating the information in these fields for those students.
5. On the Students with Shared Family Information page, select the **Update** checkboxes to change the linked student's demographic information to match the

modified demographic information of the selected student. For example, if you change the selected student's street address from 12 Maple Way to 1 Apple Drive and the linked student also lives at 12 Maple Way, select the **Update** checkbox to change the linked student's address to 1 Apple Drive.

Staff Ethnicity and Race Information

Once federal ethnicity and race is setup, as well as scheduling/reporting ethnicity, you can then import or manually enter teacher ethnicity and race data.

Import Staff Races

During the initial setup of federal race and ethnicity, use the Quick Import function to transfer staff member race codes into the PowerSchool Teacher Races table. The import file must include the following columns: RaceCd and TeacherID. The TeacherID value is located in the ID field in the Teachers table. For general information, see *Quick Import*. For state-specific information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Note: When importing federal ethnicity and race settings and data into PowerSchool, it is important to perform the imports in the following order: Federal Race Categories, Race Codes, Student Races, and then Teacher Races.

Enter Ethnicity and Race Information for a Group of Staff Members

During the initial setup of federal race and ethnicity, use the Set Staff Field Value function to assign a reporting ethnicity to a group of staff members. For general information, see *Set Staff Field Value*. For state-specific federal ethnicity and race information, see PowerSchool recommended state-specific setup of federal race and ethnicity settings available on PowerSource.

Enter Ethnicity and Race Information for an Individual Staff Member

Use the following procedure to enter ethnicity and race information for the selected staff member.

How to Enter Ethnicity and Race Information for an Individual Staff Member

1. On the start page, search for and select a staff member. For more information, see Staff Search.
2. Click **Edit Information**. The Edit Information page appears.
3. Use the following table to edit information in the fields:

Field	Description
Ethnicity	Specify whether or not the staff member is Hispanic or Latino by selecting the appropriate option. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Race	Specify the staff member's race by selecting the appropriate checkboxes. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Reporting Ethnicity	Specify the staff member's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.

4. Click **Submit**. The Edit Information page appears.

Search by Ethnicity and Race Fields

To search for students or staff based on ethnicity or race; use any of the following fields in combination with a valid operator (is (=), is not (#), in, not in). Search results will vary depending on the expression you enter.

Field	Description
Ethnicity	Use to search for students or staff based on ethnicity, using the scheduling/reporting ethnicity code.
FedEthnicity	Use to search for students or staff based on ethnicity, using the federal ethnicity code indicated by students or staff answering, “Are you Hispanic or Latino?” 1 = Yes, 0 = No, and 2 = Declined to answer.
FedRaceDecline	Use to search for students or staff based on race, using the federal race code indicated by students or staff indicating one or more races specified (0) of declining to specify race (1).
Race	Use to search for students or staff based on race, using the district race code description.
RaceCode	Use to search for students or staff based on race, using the federal race code.
Race.Fed	Use to search for students or staff based on federal race, using the federal category description.
Race.FedCode	Use to search for students or staff based on federal race, using the federal category code.

Search for Students by Ethnicity and Race Fields

Note: For more information about searching for students, see *Student Search*.

How to Search for Students by Ethnicity and Race Fields

1. On the start page, choose **Student Search** under People in the main menu. The Search Student page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the ethnicity or race field you want to add. The Field List pop-up closes, and the selected field appears in the **Search Student** field.
5. Enter a field operator and value after the field in the **Search Student** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click the **Search** icon. The Student Selection page displays the students that meet the criteria you entered.

Search for Staff by Ethnicity and Race Fields

Note: For more information about searching for staff, see Staff Search.

How to Search for Staff by Ethnicity and Race Fields

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the ethnicity or race field you want to add. The Field List pop-up closes, and the selected field appears in the **Search Staff** field.
5. Enter a field operator and value after the field in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click the **Search** icon. The Select a Staff Member page displays the staff members that meet the criteria you entered.

Fees Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Fees Management spans PowerSchool, the PowerSchool Student and Parent portal, and PowerTeacher. To get started immediately, set up fees. Once you have completed setting up fees, you can begin performing a variety of fee functions for individual students using Fee Transactions or for a group of students using Fee Functions.

Note: Fee Transactions does not apply to lunch account balances. For information about lunch transactions, see *Lunch Transactions*.

Setup

Fee Categories

Fee categories are used as an organizational tool to group fee types. The fee category indicates the manner in which fee types are assessed. PowerSchool includes two default fee categories, School and Course. Using the School fee category, you can create school enrollment fees that are automatically assessed at the school level when a student enrolls in school. Using the Course fee category, you can create course enrollment fees that are automatically assessed at the course level when a student enrolls in a course. In addition, you can create as many other fee categories as your district needs. These other fee categories are called Student fees and are assessed manually for and individual student or for a group of students. Once you have finished creating the fee categories you will need, you can then create fee types using those fee categories.

Note: A third non-editable fee category called Start of Year Balance, or SOY Balance, may appear if balances have been transferred using the End-of-Year process or if you have performed the Fee Conversion. You cannot associate fee types to this category, nor can you create fees using it. This information acts “behind the scenes” and appears on the student Fee Transactions page. For more information, see *End-of-Year Process*.

Example

Fee Category	Assessed
School	Automatically when students enroll in school.
Course	Automatically when students enroll in a course.

[Student]	Manually by district or school administrator.

How to Add a Fee Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Fees, click **Fee Categories**. The Fee Categories page appears.
3. Click **New**. The New Fee Category page appears.
4. Enter the name of the fee category in the **Fee Category** field, such as **Field Trip**.
5. Click **Submit**. The Fee Categories page displays the new fee category.

How to Edit a Fee Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Fees, click **Fee Categories**. The Fee Categories page appears.
3. Click the fee category you want to edit. The Edit Fee Category page appears.
4. Edit the name of the fee category in the **Fee Category** field.
5. Click **Submit**. The Fee Categories page displays the edited fee category.

How to Delete a Fee Category

Once you have created a fee category, later you may find it necessary to delete it. If so, you can delete it. Note, however, it is recommended that you do not delete or modify the default fee categories. If you delete a fee category, you must then update any fee record containing that category and select a new category. Transaction records already created are not affected.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Fees, click **Fee Categories**. The Fee Categories page appears.
3. Click the fee category you want to delete. The Edit Fee Category page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Payment Methods

When setting up Fees Management, it is recommended that you review PowerSchool's payment methods to determine if they meet your district's needs. PowerSchool includes six default payment methods, cash, credit card, check, electronic fund transfer, money order, and other. In needed, you can create as many other payment methods as your district requires.

How to Add a Payment Method

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Fees, click **Payment Methods**. The Payment Methods page appears.
3. Click **New**. The New Payment Methods page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the name of the method of payment, such as **CP**.
Description	Enter a description of the method of payment, such as **Coupon**.

5. Click **Submit**. The Payment Methods page displays the new payment method.

How to Edit a Payment Method

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Fees, click **Payment Methods**. The Payment Methods page appears.
3. Click the payment method you want to edit. The Edit Payment Method page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Payment Method*.
5. Click **Submit**. The Payment Methods page displays the edited payment method.

How to Delete a Payment Method

Although payment methods can be deleted, it is recommended that you do not delete them to maintain uniformity across the states for state reporting purposes. If you delete a payment method, you must then update any fee record containing that payment method and select a new payment method. Transaction records already created are not affected.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Fees, click **Payment Methods**. The Payment Method page appears.

3. Click the payment method you want to delete. The Edit Payment Method page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Fee Types

Fee categories are used as an organizational tool to group fee types. The fee category indicates the manner in which fee types are assessed. Once you have finished creating the fee categories you will need, you can then create fee types using those fee categories.

Example

Fee Category	Fee Type
School	Enrollment Uniform
Course	Textbook Materials
[Student], such as Field Trip	Instructional Recreational

How to Add a Fee Type

Before adding fee types, fee categories must be created. For more information, see *Fee Categories*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Fee Types**. The Fee Types page appears.
3. Click **New**. The New Fee Type page appears.
4. Use the following table to edit information in the fields:

Field	Description

Fee Type	Enter the name of the fee type, such as **Recreational**.
Fee Category	Choose the fee category you want to associate the fee type to from the pop-up menu, such as **Field Trip**.
Fee Type Description	Enter an explanation of the fee type, such as **Excursions for entertainment**.

5. Click **Submit**. The Fee Types page displays the new fee type.

How to Edit a Fee Type

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Fee Types**. The Fee Types page appears.
3. Click the fee type you want to edit. The Edit Fee Type page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Fee Type*.
5. Click **Submit**. The Fee Types page displays the edited fee type.

How to Delete a Fee Type

If the fee type is not associated with a transaction, you can simply delete it. If a fee type is associated with a transaction, it is strongly recommended that you do not delete the fee type. However, if you do, you will need to manually delete or update all fee transactions that are using the fee type. Any modifications to fee transactions, including deletion, will be logged.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Fee Types**. The Fee Types page appears.
3. Click the fee type you want to delete. The Edit Fee Type page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Rank Fee Types

Once you have created fee types, you can rank them in order by which you want the fees to be paid. A lower value, such as **1**, indicates the fee type that will be paid before a fee type with a higher value, such as **3**. You can also assign a Priority value of **0** for one-off fees, such as a specific event.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Fee Types**. The Fee Types page appears.
3. Note the **Priority** field for each fee type.
4. Enter a numeric value for each fee type indicating the order in which payments are to be distributed.
5. Click **Submit**. The Fee Types page appears.

School Enrollment Fees

School enrollment fees are used to automatically assess certain fees when a student enrolls in school, such as Enrollment, Uniform, etc. When creating school enrollment fees, you can indicate whether you want the fee to be proratable.

Note: When importing students, school enrollment fees are not automatically assessed. You must manually assess school enrollment fees using Fee Functions. For more information, see *Fee Functions*.

How to Add a School Enrollment Fee

Before adding school enrollment fees, fee types must be created using the fee category of School**.** For more information, see *Fee Categories* and *Fee Types*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.
3. Click the name of a school. The Edit School page appears.
4. In the School Enrollment Fees section, click **New**. The New School Enrollment Fee page appears.
5. Use the following table to edit information in the fields:

Field	Description
School Name	The selected school's full name appears.
Fee Type	Choose the type of fee from the pop-up menu.

	Note: Only those fee types with the fee category of School appear in the pop-up menu. For more information, see *Fee Types*.
Department	Choose the department you want to associate the fee to from the pop-up menu, if any.
Amount	Enter the amount of the fee to be assessed.
Date	Enter the date the fee becomes applicable. The default is set to today's date.
Proratable	Select the checkbox to indicate that the fee is to be assessed based on the number of school days in the year. If a student enrolls in school after the start date or withdraws from school before the end date, the student will only be charged for that portion of the school year.

6. Click **Submit**. The Fee Types page displays the new fee type.

How to Edit a School Enrollment Fee

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.
3. Click the name of a school. The Edit School page appears.
4. In the School Enrollment Fees section, click the fee type you want to edit. The Edit School Enrollment Fee page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a School Enrollment Fee*.
6. Click **Submit**. The Fee Types page displays the updated fee type.

How to Delete a School Enrollment Fee

Once you have created a school enrollment fee, later you may find it necessary to delete it. If so, you can delete it.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.
3. Click the name of a school. The Edit School page appears.
4. In the School Enrollment Fees section, click the fee type you want to delete. The Edit School Enrollment Fee page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Course Enrollment Fees

Course enrollment fees are used to automatically assess certain fees when a student enrolls in a course, such as Textbook, Materials, etc. When creating course enrollment fees, you can indicate whether you want the fee to be proratable.

Note: When importing students, course enrollment fees are not automatically assessed. You must manually assess course enrollment fees using Fee Functions. For more information, see *Fee Functions*.

How to Add a Course Enrollment Fee

Before adding course enrollment fees, fee types must be created using the fee category of Course. For more information, see *Fee Categories* and *Fee Types*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Click the Number, Name, or Department of a course. The Edit Course District Information page appears.
5. Click the **Fees** tab. The Edit Course Enrollment Fees page appears.
6. Click **New**. The New Course Fee page appears.
7. Use the following table to enter information in the fields:

Field	Description
Course Name	The name of the course appears.
Course Number	The number used to identify the course appears.
Fee Type	Choose the type of fee from the pop-up menu.

	Note: Only those fee types with the fee category of Course appear in the pop-up menu. For more information, see *Fee Types*.
Department	Choose the name of the department you want to associate the fee to from the pop-up menu.
Amount	Enter the amount of the fee to be assessed.
Date	Enter the date the fee becomes applicable. The default is set to today's date.
Description	Enter a descriptive explanation of the fee.
Proratable	Select the checkbox to indicate that the fee is to be assessed based on the number of days within the term for the course section. If a student enrolls in the course after the start date or drops the course before the end date, the student will only be charged for that portion of the course.

8. Click **Submit**. The Courses page appears.

How to Edit a Course Enrollment Fee

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Click **Yes** in the Fee column of the course you want to edit. The Edit Course Enrollment Fees page appears.
5. Click the course enrollment fee in the Fee Type column that you want to edit. The Edit Course Fee page appears.
6. Edit the information as needed. For field descriptions, see *How to Add a Course Enrollment Fee*.
7. Click **Submit**. The Courses page appears.

How to Delete a Course Enrollment Fee

Once you have created a course enrollment fee, later you may find it necessary to delete it. If so, you can delete it.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Click **Yes** in the Fee column of the course you want to delete. The Edit Course Enrollment Fees page appears.
5. Click the course enrollment fee in the Fee Type column that you want to delete. The Edit Course Fee page appears.
6. Click **Delete**. The Courses page appears.

Work with Students

Fee Exemption Status

Using the **Fee Exemption Status** pop-up menu, you can indicate whether or not a student is subject to school or course enrollment fees. While you can indicate that school or course fees not be automatically assessed, this does not prohibit fees from being manually assessed.

Note: Field level security may be used to restrict this information (STUDENTS.FEE_EXEMPTION_STATUS). For more information, see *Field Level Security*.

How to Assign Fee Exemption Status to an Individual Student

Use this procedure to exempt an individual student from course enrollment fees, school enrollment fees, or all fees. For more information, see *Other Information*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Other Information** from the student pages menu. The Other Information page appears.
3. Choose the student's exemption status from the **Fee Exemption Status** pop-up menu:
   - **Student not Exempted**
   - **Student Exempted from Course Fees**
   - **Student Exempted from School Fees**
   - **Student Exempted from All Fees**
4. Click **Submit**. The Other Information page displays the changes.

How to Assign Fee Exemption Status to a Group of Students

Use this procedure to exempt all students within a given school from course enrollment fees, school enrollment fees, or all fees. For more information, see *School Information*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.
3. Click the name of the school in the Schools column that you want to exempt from fees. The Edit School page appears.
4. Choose the fee exemption status you want to assign to the school from the **Fee Exemption Status** pop-up menu:
    - **Student not Exempted**
    - **Student Exempted from Course Fees**
    - **Student Exempted from School Fees**
    - **Student Exempted from All Fees**
5. Click **Submit**. The Schools/School Info page displays the new school.

Fee Transactions

Fee Transactions represent the exchanges of funds for a student within the PowerSchool system. You can use the Fee Transactions page to view a wide variety of transaction information, including fee record information, transactions associated with a fee, all transactions associated with a student for the current school and year, and global balances associated to a student for each school and year combination. Additionally, you can create transactions, distribute payments, and issue refunds for individual students. For information about fee functions for a group of students, see *Fee Functions*.

Note: Fee Transactions do not apply to lunch account balances. For information about lunch transactions, see *Lunch Transactions*.

How to View Fee Transaction Summary

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page displays the following information:

Field	Description

Balance	The student's total debits and credits for the current year and school. **Note:** The Balance and the Totals may not be the same in cases where the student has a negative balance.
Date	The date the fee transaction occurred. Click to access the Transactions page, which displays information about the fee record. For more information, see *How to View Fee Record Information*.
Course	The number of the associated course.
Fee Type	The fee type from which the fee transaction was created. For more information, see *Fee Types*.
Priority	The priority in which this fee is to be paid in respect to the other fee types. For more information, see *How to Rank Fee Types*.
Description	An explanation of the fee.
Charged	The total amount charged to the student, considering any adjustments.
Adjust	If a prorated course fee, this is the amount of the fee adjusted for the number of days the student is enrolled within the term for the course section. If a student enrolls in the course after the start date or drops the course before the end date, the student will only be charged an adjusted, prorated fee for that portion of the course. For more information, see *School Enrollment Fees* or *Course Enrollment Fees*.
Fee	The total amount of the fee.
Paid	The amount of the fee that the student has paid. Click to access the Transactions page, which displays the transactions associated

	with the fee. For more information, see *How to View Transactions Associated with a Fee*.
Balance	The amount of the fee that the student owes.

How to Add Student Fees for an Individual Student

Using the Fee Transactions page, you can manually assess an individual student with student fees, such as Recreational Field Trip. Be sure the information you enter is accurate, as there is no edit or delete function for student fees (to preserve the history of the transaction). If you inadvertently make a mistake, you will have to create a transaction using payment, credit, or void to reverse the effect.

Note: To manually assess a group of students with student fees, see *Fee Functions*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Choose a fee type from **Create New Fee** pop-up menu. The New Fee Transaction page appears.
4. Use the following table to enter information in the fields:

Field	Description
New Fee	The selected fee type appears, such as **Recreational**. **Note:** For more information, see *Fee Types*.
Category	The category associated to the fee type appears, such as **Field Trip**. **Note:** For more information, see *Fee Categories*.
Department	Choose the appropriate department from the pop-up menu.
Transaction Date	Enter the date the student fee is to be assessed. The default is set to today's date.

	Note: If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation of the student fee being created, such as **Excursion to water park**.
Amount of Fee	The dollar amount to be assessed to the student's account balance, such as **75.00**.
Amount of Credit	If the student is providing full or partial payment at the time this fee is being created, enter the payment amount in this field, such as **25.00**. **Note:** If the student's payment is greater than the fee, the extra money will be applied as payment to other unpaid fees based on fee type priority.
Payment Method	If the student is providing full or partial payment at the time this fee is being created, choose the method of payment from the pop-up menu, such as **Check/Draft (Check)**.
Payment Reference Number	If the student is providing full or partial payment at the time this fee is being created, enter the payment reference number in this field, such as **Check Number 4076**.
Course Number	If this fee is related to a course, enter the number used to identify the course in this field, such as **1511 (Biology)**.

5. Click **Submit**. A confirmation message appears.

How to Delete a Fee Record

If a fee record is created in error and there are no payments recorded against the fee record, you can use this procedure to delete the fee record.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click the date in the Date column of the transaction line item you want to delete. The View Fee Transaction page appears.
4. Click **Delete**.

   Note: The Delete button appears shaded if there are payment recorded against the fee record.

5. Click **Confirm Delete**. The Fee Transactions page appears.

How to View Fee Record Information

Use this procedure to view fee record information for a line.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click the date in the Date column of the transaction line item you want to view. The View Fee Transaction page displays the following information:

Field	**Description**
New Fee	The selected fee type. For more information, see *Fee Types*.
Category	The category associated to the fee type. For more information, see *Fee Categories*.
Transaction Date	The date the student fee was created.
Description	The explanation of the fee.
Amount of Fee	The total amount of the fee.
Amount Paid	The amount of the fee that the student has paid.
Balance	The amount of the fee that the student owes.

Department Name	The name of the department associated to this fee, if any.
Course Number	The number of the course associated to this fee, if any.
Course Name	The name of the course associated to this fee, if any.
Payment Method	The method by which the student has paid for the fee. For more information, see *Payment Methods*.
Priority	The priority in which this fee is to be paid in respect to the other fee types. For more information, see *How to Rank Fee Types*.
Pro Rated	Indicates whether or not the fee is prorated. For more information, see *School Enrollment Fees* or *Course Enrollment Fees*.
Original Fee	The amount of the original fee.
YearID	The year in which the fee was created.
Group Transaction ID	If the fee was created using Fee Functions, a system-generated group transaction identification number appears. For more information, see *Fee Functions*.

How to View Transactions Associated with a Fee

Use this procedure to view transactions associated with a fee for a line item.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click the amount in the Paid column of the transaction line item you want to view. The Transactions page displays the following information:

Field	Description

Date	The date the transaction occurred. Click to view detailed information about the transaction record.
Time	The time the transaction occurred.
Type	The type of fee associated to the transaction.
Debit	The amount paid.
Credit	The amount overpaid.
Balance	The amount of the fee that the student owes.
Payment Method	The method by which the fee was paid.
Description	An explanation for creating the transaction.

How to View All Transactions

Use this procedure to view all transactions associated with a student for the current school and year.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **All Transactions**. The All Transactions page displays the following information:

Field	**Description**
Date	The date the transaction occurred. Click to view detailed information about the transaction record.
Time	The time the transaction occurred.

Type	Type of the transaction, such as **Payment** or **Refund**.
Starting Bal.	The student's balance before the transaction.
Amount	The amount of the transaction.
Net Effect	The student's balance after the transaction.
Method	The method of payment, such as **cash** or **check**.
Reference	Payment reference information entered during the transaction, if any. For example, if the student paid by check or credit card, the check number or credit card number may appear in this column.
Description	A brief explanation of the transaction.

How to View Fee Balances

Use this procedure to view global balances associated to a student for each school and year combination.

Note: Student fee balances can also be viewed in PowerTeacher as well as PowerSchool Parent if the **Do not show the lunch balance on parent/student pages** checkbox on the Miscellaneous district settings page is selected. For more information, see *Miscellaneous District Settings*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **Fee Balances**. The Fee Balances page displays the following information:

Field	**Description**
School	The school identification number.

Year	The current year.
Debit	The total amount the student owes.
Credit	The total amount the student is owed.
Balance	The difference between what the student owes and what is owed to the student.

How to Receive a Fee Payment

When a student's payment is received, use this procedure to enter the payment and have it distributed across all outstanding fees based on fee type priority, see *How to Distribute Payments*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Locate the fee for which you want to enter a payment.
4. Click **Payment** in the Transaction column. The New Transaction page appears.
5. Use the following table to enter information in the fields:

Field	Description
Transaction For	The fee type from which the fee was created appears, such as **Enrollment**. For more information about fee types, see *Fee Types*.
Course	The number used to identify the course appears. The information only displays if a course was associated to the fee.
Transaction Date	Enter the date of the transaction. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an

	alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Transaction Type	Choose the type of transaction you want to create from the pop-up menu: • **Payment** • **Credit** • **Void**
Description	Enter an explanation for creating the transaction.
Amount	Enter the amount of the payment. If the Transaction Type selected is **Void**, there is no need to enter a value in this field. The amount will be set by the fee balance. **Note:** If the payment is higher than the balance, the payment will be rejected.
Payment Method	Choose the method by which the payment is being made from the pop-up menu. For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

6. Click **Submit**. A confirmation message appears.

How to Distribute Payments

Use this procedure to enter a payment into the system and have it allocated across all outstanding fees based on fee type priority. For more information about fee type priority, see *How to Rank Fee Types*. To enter a payment for a selected fee, see *How to Receive a Payment*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **Distribute** in the Transaction column. The Distribute Payment page appears.

4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the transaction. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for creating the transaction.
Amount	Enter the amount of the payment.
Payment Method	Choose the method by which the payment is being distributed from the pop-up menu. For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

5. Click **Submit**. A confirmation message appears.

How to Issue Refunds

Use this procedure to issue a refund. Refunds can be issued when the student's global balance is negative (the school owes money to the student). Refunds cannot be issued when the student's global balance is positive (the student owes money to the school) or null (global balance of zero).

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **Refund**. The Refund page appears.
4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the refund. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for creating the refund.
Amount	Enter the amount of the credit.
Payment Method	Choose the method by which the credit is being made from the pop-up menu. For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

5. Click **Submit**. A confirmation message appears.

Fee Functions

Fee Functions offers similar functionality as Fee Transactions, but these functions are used for a selected group of students. You can access Fee Functions one of two ways: click **Special Functions** on the start page or search for and select a group of students and then choose **Fee Functions** from the Group Functions pop-up menu. From the Fee Functions page, you can create transactions, assess school enrollment and course enrollment fees, and clear current balances. Each time you perform a group fee function, the system generates a group ID. The group ID can then be used to perform additional actions, such as reversing fee assessments or transactions and for generating reports.

Group Transaction IDs Warning

Each time such a group transaction is performed, a new Group Transaction ID is generated and assigned to each record created by the transaction. When running any of the group functions that require entering a Group Transaction ID, be sure to enter the correct Group Transaction ID. If you inadvertently enter the wrong Group Transaction ID, you may be affecting a large amount of date and reversing the error may take considerable time. To find the group transaction ID, check at least one fee or transaction record that has been created by the group fee functions.

How to Add Student Fees for Group of Students

Using the Fee Functions page, you can manually assess a group of students with student fees, such as Recreational Field Trip. Be sure the information you enter is accurate, as there is no edit or delete function for student fees (to preserve the history of the transaction). If you inadvertently make a mistake, you will have to create a transaction using payment, credit, or void to reverse the effect.

Note: To manually assess an individual student with student fees, see *Fee Transactions*.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New Fee**. The New Fee page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Add Fee For	The selected number of students appears.
Fee Type	Choose the fee type you want use to create the fee.
Department	Choose the department you want to associate to this fee, if any.
Transaction Date	Enter the date the student fee is to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an

	alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation of the fee being created.
Amount of Fee	The dollar amount to be assessed to the students' account balance appears.
Amount of Credit	If the students are providing full or partial payment at the time this fee is being created, enter the payment amount in this field. **Note:** If the students' payment is greater than the fee, the extra money will be applied as payment to other unpaid fees based on fee type priority.
Payment Method	If the students are providing full or partial payment at the time this fee is being created, choose the method of payment from the pop-up menu.
Payment Reference Number	If the students are providing full or partial payment at the time this fee is being created, enter the payment reference number in this field.
Course Number	If this fee is related to a course, enter the number used to identify the course in this field.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

How to Add School Enrollment Fees

School enrollment fees are used to automatically assess certain fees when students enroll in school. For more information, see *School Enrollment Fees*. If school enrollment fees are created after students have enrolled in school, then the new school enrollment fees need to be manually assessed.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.

2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New School Enrollment Fee**. The New School Enrollment Fee page appears.
5. Use the following table to enter information in the fields:

Field	Description
Add Selected School Enrollment Fees For	The selected number of students appears.
School Enrollment Fees For	The name of the selected students' school appears.
Description (Fee Type)	Select each school enrollment fee checkbox you want to be applied to the selected students.
Amount	The dollar amount to be assessed to the selected students' account balance appears.
Transaction Date	Enter the date the fees are to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

   Note: If a fee is marked as proratable, it will be assessed on the basis of the number of school days in the year.

How to Add Course Enrollment Fees

Course enrollment fees are used to automatically assess certain fees when students enroll in a course that has fees associated to it. For more information, see *Course Enrollment Fees*. If course enrollment fees are created after students have enrolled in a course, then the new course enrollment fees need to be manually assessed.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New Course Enrollment Fee**. The New Course Enrollment Fee page appears.
5. Use the following table to enter information in the fields:

Field	Description
Add Course Enrollment Fees For	The selected number of students appears.
Course Number	Enter the course code for which you want to assess course enrollment fees.

6. Click **Submit**. The second New Course Enrollment page appears.
7. Use the following table to enter information in the fields:

Field	Description
Add Course Enrollment Fees For	The selected number of students appears.
Course Number	The course code for which you want to assess course enrollment fees appears.

Description (Fee Type)	Select each course enrollment fee checkbox you want to be applied to the selected students.
Amount	The dollar amount to be assessed to the selected students' account balance appears.
Transaction Date	Enter the date the fees are to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

8. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

   Note: If a fee is marked as proratable, it will be assessed on the basis of the number of days within the term for the course section.

How to Create a New Transaction

Use this procedure to create a new transaction for the selected group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New Transaction**. The New Transaction page appears.
5. Use the following table to enter information in the fields:

Field	Description

Add Transaction For	The number of selected students for which their transaction is being created.
Fee Type	The fee type from which the fee was created appears, such as Enrollment. **Note:** For more information about fee types, see *Fee Types*.
Transaction Date	Enter the date of the transaction. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Transaction Type	Choose from the pop-up menu the type of transaction you want to create: • **Payment** • **Credit** • **Void**
Description	Enter an explanation for creating the transaction.
Amount	Enter the amount of the payment. If the Transaction Type selected is **Void**, there is no need to enter a value in this field. The amount will be set by the fee balance. **Note:** If you make a mass payment and the payment is higher than the balance for a specific student, that student will receive a credit.
Payment Method	Choose the method from the pop-up menu by which the payment is being made: • **Cash** • **Credit Card/Bank Card** • **Check/Draft** • **EFT (Electronic Funds Transfer)**

	• **Money Order** • **Vouchers** For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

How to Assess School Enrollment Fees

Use this procedure to assess school enrollment for the selected group of students. Performing this procedure automatically assigns school enrollment fees to the selected group of students. Before running this function, be sure that the fees have not already been assessed to the selected students. Otherwise, the fees may be duplicated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Assess School Enrollment Fees**. The Assess School Enrollment Fees page appears.
5. Select the appropriate option to indicate which students you want to apply the school enrollment fee to:
   - **For all currently enrolled students in [name of school]**
   - **For the selected [number] students only**
   - **For [name of student] only**
6. Click **Submit**. A confirmation message appears.

How to Assess Course Enrollment Fees

Use this procedure to assess course enrollment for the selected group of students. Performing this procedure automatically assigns course enrollment fees to the selected group of students. Before using this function, be sure that the fees have not already been assigned to the selected students. Otherwise, the fees may be duplicated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Assess Course Enrollment Fees**. The Assess Course Enrollment Fees page appears.
5. Select the appropriate option to indicate which students you want to apply the course fee to:
   - **For all currently enrolled students in [name of school]**
   - **For the selected [number] students only**
   - **For [name of student] only:**
6. Click **Submit**. A confirmation message appears.

How to Clear Current Balance

Use this procedure to clear current balances for the selected group of students. Performing this procedure removes school or course enrollment fees that have been assigned to a selected group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Clear Current Balance**. The Clear Current Balance page appears.
5. Use the following table to enter information in the fields:

Field	Description
[Student Selection]	Select the appropriate option to indicate which students you want to clear current balances for: • **For all currently enrolled students in [name of school]** • **For the selected [number] students only** • **For [name of student] only**
Transaction Date	Enter the date for which you want the clearance to occur. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for clearing the balance.

6. Click **Submit**. A confirmation message appears.

How to Reverse Action Using Group Transaction ID

Use this procedure to reverse unpaid fees. This is the easiest way to correct an action that you have performed on a group of students. Performing this procedure will not reverse a transaction of type Void. Transactions that have been performed outside of the group function do not have a Group Transaction ID. In those cases, you have to reverse them manually.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Reverse Action Using Group Transaction ID**. The Reverse Action Using Group Transaction ID page appears.
5. Use the following table to enter information in the fields:

Field	Description
Group Transaction ID	Enter appropriate Group Transaction ID. **Note:** It is very important that you enter the correct Group Transaction ID.
Transaction Date	Enter the date for which you want the reversal to occur. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for reversing an action.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

Search for Students by Fees/Transactions

To search for students based on fee or transaction information use any of the following tables and fields in combination with a valid comparator, such as *<table_name>.<field_name><comparator><value>. Search results vary depending on the expression you enter. For more information about searching, see *Student Search*.

Note: Fees search codes are designed for searches only. Although they do not work in reports or exports, there is a Fees List Object that you can use to print items such as balances and transactions on an object report. For more information, see *Fees List Objects*.

Table	Fields
[146]Fee	Fields within this table include: • Course_Name

	• Course_Number • CreationDate • Custom • Date • DateTime • Department_Name • Description • Fee_Amount • Fee_Balance • Fee_Category_Name • Fee_Paid • Fee_Type_ID • Fee_Type_Name • Group_Transaction_ID • ID • ModificationDate • OriginalFee • Priority • Pro_Rated • SchoolFee_ID • SchoolID • StudentID • System_User_ID • TeacherID • Time • YearID
[147]Transaction	Fields within this table include: • Custom • Date • DateTime • Description • FeeID • Group_Transaction_ID • ID • NetEffect • Payment_Method • Payment_Ref_Nbr • Receipt_Nbr

	• SchoolID • Starting_Balance • StudentID • System_User_ID • TeacherID • Time • Transaction_Type • YearID
[148]Fee_Balance	Fields within this table include: • Balance • Credit • Debit • ID • SchoolID • StudentID • TeacherID

Additionally, you can use the following expressions to solicit more complex results:

Expression	Results
*fee.id=noschool	The students who are not related to a school [Fee] record.
*fee.id=nocourse	The students who are not related to a course [Fee] record.
*fee.fee_balance=partial	The students who have at least one fee with a partial balance (partially paid).
*fee_balance.balance=partial	The students who have a partial global balance (partially paid).
*fee_balance.balance=0	The students who have a global balance equal to 0. **Note:** The [Fee_balance] record for a student is created when a transaction is created. Some students may not have a [Fee_balance] record because they never had a

	transaction created. This expression looks for [Fee_balance] records with a zero balance. The students who do not have a [Fee_balance] record will not appear in the results even though their balance is zero.
*fee_balance.balance=null	The students who have no [Fee_balance] record. **Note:** This expression complements ***fee_balance.balance=0** by returning the students who have no [Fee_balance] record.

End-of-Year Process: Clear or Transfer Balances

The End-of-Year Process is used to close out the current school year and transfer all students to the grade level and school that each will attend during the upcoming school year. In addition to transferring students to their next school enrollment, fee balances can be cleared or transferred from one year to the next. If fee balances are transferred, a third non-editable fee category called Start of Year Balance, or SOY Balance, is created. For information, see the *End-of-Year Process Guide* available on PowerSource.

Reports

Fees/Transactions Object Reports

Use object reports containing fee and transaction information to create a variety of reports to suit your needs. For example, using the tag ^(FEE_GetStudentBalance) provides the current balance for a selected student during the current school year. The information is formatted as a decimal ($00.00). For more information, see *Object Reports* and *Objects on an Object Report*.

Grading User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

This guide provides comprehensive information about the configuration and administration of the PowerSchool application functions and components associated with grading.

System Administration

Average Final Grades

In most cases, final grades are determined by the classroom teacher based on rules defined in PowerTeacher Gradebook. This leaves the control over students' grade reporting, and the calculation methodology of those grades, in the hands of the most authoritative source. However, there are times when schedules are set up in a way where administrators want to average grades themselves instead of the teachers or they want to average grades across sections. The final grade averaging function provides school administrators an alternative means of calculating final grades.

The Process

The final grade averaging function can be run periodically by the PowerSchool administrator after storing grades. Final grades are calculated using up to six existing stored grades from each unique course taken during the current school year. Unique courses are identified by course number, not course name or section. Consequently, only grades that have been stored via the store grades process or hand-entered with a course number may be used in the calculation.

Once the stored grades for each course have been identified, the GPA points from each grade are averaged and the resulting value is used to create a new stored grade record. The averaging method can either be a simple arithmetic average, which is used by default, or may be weighted using a user-specified method. Each store code may receive a different weight. The weighting scheme used (20/30/50, 1/1/2, 0.2/0.2/0.6) is configurable.

The GPA point value is compared against the grade scale for the course. If an exact match is found, the letter grade corresponding to that value is used. For example, if the three grades A (4.0), B (3.0), and C (2.0) are used, with each having a weight of 1, the result would be 3. This 3 is looked up in the course's grade scale. An exact match of 3.000 is found, and a new stored grade is created using the letter grade B. However, if the C had a weight of 2, the result would be 2.75. In this case, there might not be an exact match, so the result would be rounded to the nearest value. In this case, 2.75 would be closer to 2.667 for a letter grade of B-. You can change the rounding behavior to always round up, always round down, or find the nearest value.

Since multiple letter grades may have identical GPA point values (for example, F, I, NC, and WF all have zero GPA points), the user can exclude certain letter grades from being used. This prevents a zero average from matching to NC on the grade scale. This is necessary because only the GPA point values, not the letter grades themselves, are looked at. The list of excluded letter grades must be recorded for each unique grade scale used.

Once the appropriate letter grade has been identified, absences, tardies, potential credit, earned credit (if the letter grade earns graduation credit), and teacher comments are calculated based on user-defined options. The resulting new grades are stored alongside the student's existing grades and can be printed on report cards and transcripts.

How to Modify Average Final Grades Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Grades, click **Average Final Grades**. The Average Final Grades page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Which Students	The students for whom you want to calculate average final grades. Do one of the following: • Select the single student option. This option is useful for testing. • Select **The selected students** option. This is useful when calculating final grades for a specific group of students, such as all current seniors. • Select the **All currently enrolled students** option. **Note:** If no students have been selected, only the **All currently enrolled students** option is available.
New store code	Indicates the new store code to use when storing the resulting final grade. Enter a valid store code (a letter followed by a single number). **Note:** The store code does not need to be defined in the Final Grade Setup section of School Setup.
Limit to this term	To filter by a term in the current school year, choose the term from the pop-up menu. To select all terms, do not select a term from the pop-up menu. If a specific term is selected, only stored grades from sections associated to the term will be averaged. This setting provides the ability to create administrative-level final grade weighting for a section that met during a specific term.

Use these final grades	Enter the store codes for up to six existing stored grades. You may optionally enter a weight value for each grade in the Weight field. This value is used in the calculation of the final letter grade but will not affect attendance or credit calculations. If no value is entered, 1 is used.
Absences and tardies are	The method by which you want absences and tardies calculated. Choose one of the following from the pop-up menu: • **Totals of values from historical grades** to record the cumulative total of absences and tardies from all final grades used. • **Averages of values from historical grades** to record the simple average of the absences and tardies from all final grades used. • **The value of the last record processed** to copy the absence and tardy numbers from the last final grade in the list. • **Do not calculate attendance** to record zeros for absences and tardies.
Potential credit is	The method by which you want potential credit hours determined. Choose one of the following from the pop-up menu: • **Total of potential credit from historical grades** to record the cumulative total of potential credit from all final grades used. • **Average of potential credit from historical grades** to record the simple average of the potential credit from all final grades used. • **The value of the last record processed** to copy the potential credit amount from the last final grade in the list. • **Potential credit from course record** to record the potential credit amount of the parent course record. • **Do not award credit** to record zero for potential credit.
Teacher comments are	The method by which you want teacher comments to be included. Choose one of the following from the pop-up menu:

	• **Taken from all historical grades** to copy the teacher comments from all final grades used. Comments are prefixed with the store code. • **Taken from the last record processed** to copy the teacher comment from the last final grade in the list. • **Do not include comments** to not include teacher comments.
For these grade scales, do not assign these grades	For each grade scale, enter a comma-separated list of letter grades that you want to exclude from the calculation, such as **WF** (withdraw fail) or **I** (incomplete). To include all grades from the grade scale in the calculation, leave the field blank.
Calculate average using	Use this pop-up menu to indicate whether or not to calculate the average using points or percentages by selecting one of the following: • **Grade Points** • **Percentages**
Store which Section ID	Use this pop-up menu to indicate whether or not to populate SectionID in the new stored grade record, thus allowing inclusion of the grade on report cards. Select one of the following: • **Do not store Section ID** • **First Enrolled Section** • **Last Enrolled Section**
Use Alternate Grade Points in Calculation	Select the checkbox to use alternate grade points in the calculation. If selected, the Alternative Grade points field that appears on the New Grade/Edit Grade pages will be used in the calculation.
Store Alternate Grade Points in	Select the checkbox to store alternate grade points in the new stored grade record. If deselected, the regular grade points for the resulting grade will be stored.

Stored Grades Record	
Overwrite Existing Stored Grades Records	Select the checkbox to allow the calculated average for a particular store code to overwrite existing data for the same store code. If deselected, the existing data will not be overwritten. In addition, extra records for the store code are not created.

4. Click **Submit**. PowerSchool calculates the average final grades for the requested group of students. Progress is indicated in the browser window.

   The system creates new historical grades for the selected students and stores them using the specified store code.

Copy Final Grade Setups

Using the Copy Final Grade Setups page, you can overwrite existing Final Grade Setup from another school.

How to Copy Final Grade Setups

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Grades, click **Copy Final Grade Setups**. The Copy Final Grade Setups page appears.
3. Use the following table to enter information in the fields:

Type	**Description**
This School	The school in which you are currently working appears. If this is not the school into which you want to copy setup information, change the school by clicking the School link at the top of the page.
School to Copy From	Choose from the pop-up menu the school from which you want to copy setup information.

4. Click **Submit**. The system copies the information.

Export Historical Grades

Create an export file that contains the historical grades for a specific term. Use this procedure to save a backup file of each term's historical grades or to maintain a record of historical grades outside of PowerSchool, such as in a spreadsheet program.

How to Export Historical Grades

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Grades, click **Export Historical Grades**. The Export Historical Grades page appears.
3. Use the following table to enter information in the fields:

Field	Description
School	The page displays the school in which you are currently working. To change the school, click **School** in the navigation bar.
School Year	The current school year appears.
Store Code	Enter the store code of the term for which you want to export historical grades.
Field Delimiter	Use the pop-up menu to indicate how you want the system to separate fields in the export file: • **Tab** • **Comma**
Record Delimiter	Use the pop-up menu to indicate how you want the system to separate records in the export file: • **CRLF**: carriage return and line feed • **CR**: carriage return • **LF**: line feed

Fields to Export	Enter the internal PowerSchool field names of the fields you want to export. **Note:** If you include a field from another table, enter the table name in brackets first, such as **[students]student_number**. Press RETURN (Mac) or ENTER (Windows) after each field name.

4. Click **Submit**. The exported historical grades appear.

   Note: To save the file, choose **File** > **Save As** from your Web browser. Select a file location and type, such as a text file. Click **Save**.

Honor Roll Administration

The ability to calculate your honor roll based on grading, behavior, or attendance information is important to a school. Every school has its own way of calculating or determining who is on the honor roll and who is eligible for extracurricular activities.

First, define the various honor roll lists used by a school or district. Within those lists, set up the different honor levels that may be attained and the criteria for meeting each level. Once the setup is complete, the PowerSchool administrator should run the calculation function periodically throughout the school year. The results of the calculation are stored in a separate table in the database. These results can be viewed as a summary for a single student, a group report, or as individual components of a custom page, export, or custom report using report codes.

Honor Roll Methods

Honor roll methods define the various honor roll lists used by a school or district. You can create as many different honor roll methods as needed. Honor roll methods can be school-specific or shared among all schools on a server.

Honor Roll Levels

Every honor roll method will contain one or more honor roll levels. The evaluation order of honor roll levels is significant. Typically, the highest honor with the most stringent criteria is evaluated first. If a student does not meet the criteria for that level, the criteria for the next highest honor will be evaluated, and so on. If a student meets the criteria for an honor roll level, a record of that honor is created, and the remaining levels are skipped.

The evaluation of the criteria within each honor roll level is cumulative, meaning a student must meet all of the specified options to receive that honor. You can create as many different honor roll levels as needed.

Honor Roll Calculations

Once the honor roll methods and levels have been set up, you can calculate an honor roll at any time.

How to Create an Honor Roll Method

Note: Honor rolls that use a GPA Calculation Type of Current (Start Page > District Setup > GPA Calculations > Calculation Methods > New > Calculation Type = Current) must have a term set up that matches the Final Grade setup. For example, if an Honor Roll for the Q1 Final Grade is used, not only is a Q1 Final Grade needed, but a Q1 term setup in years and terms is also needed.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click **New**. The Honor Roll Method page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name	Enter the name of the honor roll method. This is the name that will be referred to in honor roll report codes and on other menu pages.
Description	Enter a description of the honor roll method.
Can be used by	Specifies whether the honor roll method can be used by all schools on the server, or only the current school. Do one of the following: • Select the current school option. • Select the all schools option.

5. Click **Submit**. The Honor Roll Methods page displays the new honor roll method.
6. Click **Levels** next to the method you just created. The Honor Roll Levels page appears.
7. Click **New**. The Honor Roll Level detail page appears.
8. Use the following table to enter general information:

Type	Description
Name	Enter the name of the honor roll level. This is the level name that appears on report pages and is the default value returned by the honor roll report code. This name does not need be unique, allowing you to define multiple sets of criteria for a given level.
Description	Enter a description of the honor roll level.
Evaluation Order	Enter a value specifying the order in which the various honor roll levels will be evaluated. Lower numbers are evaluated first.
Message	Enter the text message you want to appear on report cards and transcripts. **Note:** The message should be longer than the level name.

9. Use the following table to enter GPA options:

Type	Description
GPA Calculation Method	Choose the GPA calculation method to use when evaluating this honor roll level from the pop-up menu. The GPA calculation method is used for two things: determining a GPA value that may be compared against a specified cutoff value and building a list of letter grades that will be used in the Grade Options settings described below. Every honor roll level must specify a GPA calculation method.
GPA result is	Since GPA calculation methods can return alphanumeric results, choose whether the comparison should be numeric or text from the pop-up menu.
Comparison	Choose the comparator to use when comparing the result of the GPA calculation from the pop-up menu. Enter the cutoff value in the provided field. If you do not want to compare the value of the GPA calculation, leave the cutoff value field blank.

Only include grades	If selected, the checkbox setting allows you to override the settings used in the GPA calculation method so that any grades that have been flagged to be excluded from honor roll are not used in the calculation or returned in the list of grades for the grade options. Do one of the following: • Select the checkbox to allow you to override the settings used in the GPA calculation method. • Deselect the checkbox to not allow you to override the settings used in the GPA calculation method.

10. Use the following table to enter credit options information:

Type	**Description**
Potential Credit	Use the pop-up menu to choose the comparator to use when comparing the total of the potential credit hours from the list of grades returned by the GPA calculation. Enter the cutoff value in the provided field. If you do not want to compare the value of the potential credit hours, leave the cutoff value field blank.
Earned Credit	Use the pop-up menu to choose the comparator to use when comparing the total of the earned credit hours from the list of grades returned by the GPA calculation. Enter the cutoff value in the provided field. If you do not want to compare the value of the earned credit hours, leave the cutoff value field blank.
Number of unique courses	Use the pop-up menu to choose the comparator to use when comparing the number of unique course numbers found in the list of grades returned by the GPA calculation. Enter the cutoff value in the provided field. If you do not want to compare the number of unique course numbers, leave the cutoff value field blank.

11. Use the following table to enter grade options information:

Type	Description
Student must have	These four groups of grade options allow you to do comparisons on the list of letter grades returned by the GPA calculation. Choose a comparison from the pop-up menu: • **At least**: There must be at least <the specified number> of any of the grades below in the list of grades returned by the GPA calculation • **No more than**: There cannot be any more than <the specified number> of any of the grades below in the list of grades returned by the GPA calculation • **Exactly**: There must be no more than and no less than <the specified number> of any of the grades below in the list of grades returned by the GPA calculation • **None**: There cannot be any of the grades below in the list of grades returned by the GPA calculation • **Only**: There must be only the grades below in the list of grades returned by the GPA calculation.
Of the grades	Enter a comma-separated list of letter grades to use with the "Student must have" comparison. If you do not want to compare letter grades in one or more of the grade options, leave this field blank.
And	Choose additional comparisons from the pop-up menu. For each additional comparison, enter the "Students must have" and "Of these grades" information.

12. Click **Submit**. The Honor Roll Methods page displays the new honor roll level.
13. Repeat steps 7 through 12 for each level you want to create.
14. Verify the evaluation order.
15. Click **Submit**. The Honor Roll Methods page appears.

How to Edit an Honor Roll Method

Note: Honor rolls that use a GPA Calculation Type of Current (Start Page > District Setup > GPA Calculations > Calculation Methods > New > Calculation Type = Current) must have a term set up that matches the Final Grade setup. For example, if an Honor Roll for the Q1

Final Grade is used, not only is a Q1 Final Grade needed, but a Q1 term setup in years and terms is also needed.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the method you want to edit. The Honor Roll Method page appears.
4. Edit the information as needed. For field descriptions, see *How to Create an Honor Roll Method*.
5. Click **Submit**. The Honor Roll Methods page displays the edited honor roll method.

How to Delete an Honor Roll Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the method you want to delete. The Honor Roll Method page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Edit Honor Roll Levels

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the levels of the honor roll you want to edit. The Honor Roll Level page appears.
4. Click the level you want to edit. The Honor Roll Levels detail page appears.
5. Edit the information as needed. For field descriptions, see *How to Create an Honor Roll Method*.
6. Click **Submit**. The Honor Roll Levels detail page reappears.

How to Delete Honor Roll Levels

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the levels of the honor roll you want to edit. The Honor Roll Level page appears.
4. Click the level you want to delete. The Honor Roll Levels detail page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Calculate the Honor Roll

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Grades, click **Calculate Honor Roll**. The Calculate Honor Roll page appears.
3. Use the following table to enter information in the fields:

Type	Description
Which Students	Indicate which students for whom you want to calculate honor roll by selecting one of the following options: • Select the **[Student name]** option to calculate honor roll for a single student. This option is useful for testing. • Select **The selected [x] students** option to calculate honor roll for the current selection of students. This selection is useful when calculating honor roll for a specific group of students, such as all current seniors. • Select the **All [x] currently enrolled students** option to calculate honor roll for all enrolled students in the selected school.
Store Code	Indicates the new store code to use when storing the resulting honor roll. Enter a valid store code (a letter followed by a single number). **Note:** Results of the honor roll calculation will be stored using this store code for the current school year.
Honor Roll Method	The method by which you want honor roll calculated. Use the pop-up menu to make your choice. **Note:** Only one honor roll method can be calculated at a time.

4. Click **Submit**. PowerSchool calculates the specified honor roll method for the selected students.

The results of honor roll calculations may be viewed for a single student or for a group of students.

Honor Roll Codes

The honor roll code returns data based on honor roll calculations that are periodically run by the PowerSchool administrator. The honor roll code provides an easy way to access the stored data when working with a single student, such as a custom student page, quick export, or object report.

The basic syntax of the honor roll code is illustrated by the examples below. The code always starts with ***honorroll** and is followed by several parameters (name/value pairs). These parameters are always of the form **name=value**. Certain parameters are required. All other parameters are optional and default values will be used if omitted.

~(*honorroll method=High School term=Q2)
~(*honorroll method=NHS term=S1 year=2002 result=gpa)
~(*honorroll method=Honors term=Q2 grade=11)

The following table lists the parameters, values, and examples for the honor roll code. Parameters and values can be included in the code in any sequence.

Parameter	Description	Example
method	Specifies the name of the honor roll method to return. These methods are predefined by the user in the Honor Roll section of school setup. The method parameter is required. If omitted, an error message is returned.	method=High School method=NHS
term	A single term abbreviation. Specifies the store code of the appropriate honor roll record. The term parameter is required. If omitted, an error message is returned.	term=S1 term=Q3
grade	A single grade level. For KG, PK, use the numeric code 0, -1, and so forth. Specifies the historical grade level of the appropriate honor roll record. Note that grade and year are often mutually exclusive and the use of both parameters in the code may cause no record to be found. If no grade or year	grade=12 grade=8

	parameter is specified, will find an honor roll record from the current school year.	
year	A single four-digit school year. Remember that school years in PowerSchool are specified using the start year. For example, for the 2003-2004 school year, use 2003. Specifies the school year of the appropriate honor roll record. Note that grade and year are often mutually exclusive and the use of both parameters in the code may cause no record to be found. If no grade or year parameter is specified, will find an honor roll record from the current school year.	year=2003 year=2004
result	The type of data to return as the result. Valid options are level, message, gpa, schoolname, and date. Level means return the name of the honor roll level met. Message means return the text message for the honor roll level. GPA means return the GPA used to determine the honor roll level. Schoolname means return the name of the school where the student earned the honor roll. Date means return the date the honor roll was calculated. If omitted, level is returned. Note that if no honor roll is found that matches the parameters specified, no text will be returned regardless of the result setting.	result=level result=message result=gpa result=schoolname result=date

The following are annotated examples of various honor roll codes.

High school honor roll from Q3 of the student's junior year:
~(*honorroll method=High School term=Q3 grade=11)

The GPA used to determine that honor roll level:
~(*honorroll method=High School term=Q3 grade=11 result=gpa)

The NHS honor roll message from S2 of the current school year:
~(*honorroll method=NHS term=S2 result=message)

The date the Q1 Honors honor roll was calculated for this student in the 2002-2003 school year:
~(*honorroll method=Honors term=Q1 year=2002 result=date)

Permanently Store Grades

In PowerSchool, student records include two types of grades: current and historical. Current grades are the students' grades in each of their teachers' PowerTeacher systems. Historical grades are final grades, or grades that are permanently stored in the students' records. Historical grades appear on report cards and transcripts. At the end of each grading term, use the Permanently Store Grades function to copy and store the students' current grades in PowerTeacher as historical grades.

By default, PowerSchool administrators have 30 calendar days after the term end date to store or re-store grades. The "term end date" refers to the end of the scheduling term associated to a given class. For example, when storing Q1 grades for a Quarter 1 class, administrators have until 30 days after the last day of Quarter 1 to store those grades. However, when storing Q1 grades for Year Long classes, administrators have until 30 days after the end of the year to store those grades. For more information, see *Final Grades Setup for PowerTeacher*. Changes to grades beyond the 30 days within the current school year term, can also be performed using the **Show All Terms** setting.

Note: Changes to grades beyond the 30 days, but not within the current school year term, would need to be performed either manually on the student's Historical Grades page or by importing the grades.

Before permanently storing grades, be sure that you set up grade scales, final grades, and the current grade display. For more information, see *Grade Scales*, *Final Grades Setup for PowerTeacher*, and *Current Grade Display*.

Also, you should run several reports before permanently storing grades. The Student Schedule Listing report lists the current grades and any missing grades for selected students. For more information, see *How to Run the Student Schedule Listing Report*. Print the Class Rosters report for teachers to verify that all the grades are correct. For more information, see *How to Run the Class Rosters (PDF) Report*.

Warning: Be sure the to use this feature carefully, as storing grades affects historical grades, which affect various parts of PowerSchool, including (but not limited to) GPAs, transcripts, and graduation progress.

Note: This procedure may only be performed at the school level.

How to Permanently Store Grades

The Permanently Store Grades page is comprised of the following sections:

- *Which Grades*
- *Exclude/Include Class Enrollments*
- *Additional Filter Options*
- *Classes by Term Length*
- *Options for Classes Enrolled at Other Schools*
- *Options for Withholding Credit*
- *Advanced Potential and Earned Credit Options*
- *Variable Credit Storing Preferences*
- *Repeated Course Grade Suppression*

Which Grades

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Grades, click **Permanently Store Grades**. The Permanently Store Grades page appears.
3. Use the following table to enter information in the fields:

Field	Description
Use this Final Grade/Reporting Term	Enter a two or three-digit code or use the pop-up menu to choose one to indicate the term in which the students earned the grades, such as **Q1** or **S1**. The first character must be a letter, and the second and third characters must be a number. **Note:** Do not use the same store code twice in one year. The system will overwrite the grades you stored under the store code the first time with the grades you store the second time. **Note:** This value is stored as TermBinsName in the StoredGrades table and is accessible using DDA, DDE, importing and exporting.
Save with this Historical Store Code	Enter the term code from which you want to save the grades. The term code is usually the same as the store code, such as **Q1** or **S1**. For more information about defining term codes, see *Final Grades Setup*.

4. To continue, see *Exclude/Include Class Enrollments*.

Exclude/Include Class Enrollments

Using the Exclude/Include Class Enrollments section, you can store current grades based on students' enrollment or dropped class dates.

Note: If you leave the date-related fields blank, PowerSchool stores a grade for every enrollment record, including classes that students dropped during the term. Most schools enter a two-week grace period at both the beginning and end of the term. This allows for all of the add/drop procedures at the beginning of the term to be ignored in the store grades process. Also, PowerSchool does not store grades for students who enroll in your school during the last two weeks of the term.

1. Scroll to the **Exclude/Include Class Enrollments** section.
2. Use the following table to enter information in the fields:

   Note: Select any combination of the checkboxes.

Field	Description
Exclude enrollment records where the student enrolled in the class after this date	1. Select the checkbox to exclude enrollment records where the student enrolled in the class after this date. 2. Enter the date or click the **Calendar** icon to select a date.
Exclude enrollment records where the student dropped the class before this date	1. Select the checkbox to exclude enrollment records where the student dropped the class before this date. 2. Enter the date or click the **Calendar** icon to select a date.
Include only enrollment records that are currently active and that were active on this date	1. Select the checkbox to include only enrollment records that are currently active and that were active on this date. 2. Enter the date or click the **Calendar** icon to select a date.

3. To continue, see *Additional Filter Options*.

Additional Filter Options

Using the Additional Filter Option section, you can narrow the grades to be stored based on currently selected student, track, grade level, and exit date

1. Scroll to the **Additional Filter Options** section.
2. Click the arrow to expand the section. Click again to collapse the section.
3. Use the following table to enter information in the fields:

Field	Description
Store grades for currently selected () students only	To filter by student selection, do one of the following: • Select the **Store grades for currently selected () students** checkbox to permanently store grades for only the currently selected students. • Deselect the **Store grades for currently selected () students** to permanently store grades for all students in the current school. **Note:** By default, the checkbox is disabled if there are no students in the current selection.
Request that grades be stored only for a specific section	To store grades for students in a specific course section only, enter the course and section numbers, separated by a period. For example, enter **113.04** for Course 113, Section 04. You can do this when teachers are late in entering their final grades or when testing the process of storing grades. Store grades for one course section before you store grades for all course sections. Leave this field blank to store grades for all course sections. **Note:** This setting is only applicable to this school and not remote schools. All other settings in the Additional Filter Options section are applicable to this school as well as remote schools.
Student Grade Level	To filter by grade level, select the checkboxes of the grade levels by which you want to filter the student storing selection.
Track	To filter by track, select the checkboxes of the tracks by which you want to filter the student storing selection.

School Exit Date	To filter by exit date range (first day the student's enrollment is not active or the day after the student's last day in class), enter the date range by which you want to filter the storing selection in the **From** and **to** fields, or click the **Calendar** icon to select a date. **Note:** This setting does not find students who were enrolled through the specified range but finds students whose school exit date falls within the specified range.

4. To continue, see *Classes by Term Length*.

Classes by Term Length

Using the Classes by Term Length section, you can indicate the terms for which you want to store grades.

1. Scroll to the **Classes by Term Length** section.
2. Use the following table to enter information in the fields:

Field	**Description**
[Terms]	The name of the term and date range of the term appears.
Store	For each term, choose one of the following from the pop-up menu: • **Do not store.** • **Store with credit.** • **Store with no credit.** **Note:** If the **Show All Terms** is set to **Yes** and **Store with credit** or **Store with no credit** is selected, the following message may appear "The [term name] is a [past, recently started, future] term. Are you sure you want to proceed with configuring to store grades for this term?" Click to **Yes** to confirm. Otherwise, click **Cancel**.
% of Course Credit	If **Do not store** is selected, the percent field appears shaded and no value can be entered.

	If **Store with credit** is selected, enter a percentage of the course credit to award at the time grades are permanently stored. Valid values range from **1** to **400**. If **Store with no credit** is selected, the field is automatically populated with a **0**. The value may not be changed from **0**.
Show All Terms?	By default terms that are in progress or recently passed appear. If you are storing grades for a term that is not in progress or recently passed, you may need to display all terms. If a term was already stored, you will overwrite the grades for that term and may affect graduation credit, GPAs, and transcripts. Indicate the terms for which you want to store grades: • Choose **No** to show only terms that are in progress or recently passed. This option is selected by default. • Choose **Yes** to show all terms for the current school year term. **Note:** If the **Show All Terms** is set to **Yes** and the server date does not fall within a scheduling term, the term defaults to the **Default Term When Between School Years** setting. For more information, see *Miscellaneous District Settings*. The name of the term and date range of the term appears based on your selection. Current terms appear bold, past terms appear not bold, and future terms appear not bold and italicized. **Note:** Past terms indicate the term ended beyond 30 days from today's date. Recently started terms indicate the term started within 10 days prior to today's date. Current term indicates the term has not started within 10 days prior to today's date and has not ended within the last 30 days from today's date. Future terms indicate the term has not yet started.

3. To continue, see *Options for Classes Enrolled at Other Schools*.

Options for Classes Enrolled at Other Schools

Using the Options for Classes Enrolled at Other Schools section, you can indicate whether to store grades for all schools or for the selected school only. For example, if a middle school student takes a class at the high school, the middle school must select this option when permanently storing grades.

Note: When storing grades for students taking classes at other schools, the TermID fields must match between the schools for those enrollments to store correctly.

1. Scroll to the **Options for Classes Enrolled at Other Schools** section.
2. Use the following table to enter information in the fields:

Field	Description
Store grades for classes enrolled at	Select whether to store grades for all schools or for the selected school only. If storing for the selected school only, PowerSchool will not store grades for the other schools at which students may take classes.
Record the school name of	Select which school name to use when storing grades. Select either the other school or the current school.

3. To continue, see *Options for Withholding Credit.*

Options for Withholding Credit

Using the Options for Withholding Credit section, you can indicate whether or not to apply options for withholding credit during the permanently store grades process. If applied, a student may be allowed to miss a certain number of classes. However, if the student exceeds the allowable attendance points, any credit the student had earned will be cleared and a grade indicating such will be given. For example, if a student originally receives a grade of C for a course; however, due to excessive absences, the student receives an I (Incomplete) and no credit for the course.

Note: These settings are retained and available each time you navigate back to this page/section.

1. Scroll to the **Options for Withholding Credit** section.
2. Use the following table to enter information in the fields:

Field	Description
[Checkbox]	Do one of the following: • Select the checkbox to apply options for withholding credit. If selected, a student may be allowed to miss a certain number of classes. However, if the student exceeds the allowable attendance points, then the student will not receive credit for the course and any credit they had earned will be cleared. • Deselect the checkbox if you do not want to apply options for withholding credit.
If more than [ ] attendance points have been accumulated	Enter the number of times a student is allowed to miss a class, such as 5.
Between the dates of [ ] and [ ]	Enter the date range of the course, such as 09/03/2012 to 12/21/2012.
Then give the student a grade of [ ]	Enter the grade the student will receive if the attendance points are exceeded, such as I (Incomplete).
And a GPA point value of [ ]	Do one of the following: • Enter a value of zero or higher to replace any existing GPA point value for the affected grades. • Leave blank if you do not want to replace any existing GPA point value for the affected grades.
And store the real grade in the "teacher comment" field with this comment	Enter a comment if you want the original grade the student earned to appear with the comment.

3. To continue, see *Advanced Potential and Earned Credit Options.*

Advanced Potential and Earned Credit Options

Using the Advanced Potential and Earned Credit Options section, you can indicate the options you want to apply for storing potential and earned credit.

1. Scroll to the **Advanced Potential and Earned Credit Options** section.
2. Click the arrow to expand the section. Click again to collapse the section.
3. Choose one of the following from the When storing with credit pop-up menu:
    - **Store Both Potential and Earned Credit**
    - **Store Potential Credit Only**
    - **Store Earned Credit**
4. To continue, see *Variable Credit Storing Preferences.*

    Note: Advanced Potential and Earned Credit Options may or may not be used with the Variable Credit Storing Preferences. If used together, the Advanced Potential and Earned Credit Options withhold earned or potential credit even if a teacher has specified awarded (earned) or attempted (potential).

    For example, if a teacher has specified 1 for **Variable Awarded Credit** and **Variable Attempted Credit** in PowerTeacher Gradebook, then the administrator uses the Advanced Potential and Earned Credit Options to **Store Potential Credit Only**, then the result would be 1 credit for attempted (potential) and no credit for awarded (earned).

Variable Credit Storing Preferences

Using the Variable Credit Storing Preferences section, you can indicate the options you want to apply for storing variable credit.

Note: These options only apply if variable credit is enabled. Variable credit may be enabled for an individual section or for multiple sections.

1. Scroll to the **Variable Credit Storing Preferences** section.
2. Click the arrow to expand the section. Click again to collapse the section.
3. Use the following table to enter information in the fields:

Field	**Description**

Store these credit hours	Indicate which credit hours you want to store by choosing one of the following from the pop-up menu: • **Awarded and Attempted** - Earned and potential credit. • **Awarded** - Earned credit. • **Attempted** - Potential credit. • **None**
Store this when teacher has not entered variable credit hours	Indicate how to handle variable credit where no value has been entered by teachers by choosing one of the following from the pop-up menu: • **Credit hours for course/gradescale** - Store the credit hours as defined in the course and gradescale. • **0** - Store the credit hours as zero.
Round or truncate	Indicate how to handle variable credit values entered by teachers by choosing one of the following from the pop-up menu: • **Round** • **Truncate**
Number of decimal places in variable credit hours	Indicate the number of allowable decimals by choosing one of the following from the pop-up menu: • **0** • **1** • **2** • **3** • **4**

4. To continue, see *Repeated Course Grade Suppression.*

Repeated Course Grade Suppression

Using the Repeated Course Grade Suppression section, you can indicate whether to apply repeated course grade suppression policy rules. If enabled, stored grades related to grade scales that allow repeated course grade suppression will be evaluated by the repeated course grade suppression rules during the permanently store grades process.

Note: This setting is retained and available each time you navigate back to this page/section.

Note: For more information, see *Repeated Course Grade Suppression*.

1. Scroll to the **Repeated Course Grade Suppression** section.
2. Click the arrow to expand the section. Click again to collapse the section.
3. Use the following table to enter information in the fields:

Field	Description
Apply Repeated Course Grade Suppression Policy Rules	Select the checkbox to allow repeated course grade suppression. Otherwise, leave blank.

4. Click **Save**. A confirmation message appears.

District Setup

Citizenship Codes

Use this page to create, view, edit, or delete citizenship codes used when grading students. These codes are available in PowerTeacher Gradebook.

How to Add a Citizenship Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Citizenship Codes**. The Citizenship Codes page appears.
3. Click **New**. The Edit Citizenship Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the citizenship code.
Description	Enter a description for the citizenship code.
Sort order for display	Use the pop-up menu to choose the sort order to appear on the Citizenship Codes page.

5. Click **Submit**. The Citizenship Codes page displays the new citizenship code.

How to Edit a Citizenship Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Citizenship Codes**. The Citizenship Codes page appears.
3. Click either the code or the description of the citizenship code you want to edit. The Edit Citizenship Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Citizenship Code*.
5. Click **Submit**. The Citizenship Codes page displays the edited citizenship code.

How to Delete a Citizenship Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Citizenship Codes**. The Citizenship Codes page appears.
3. Click either the code or the description of the citizenship code you want to delete. The Edit Citizenship Code page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Comment Setup

Teacher comments are an essential tool for communicating information about a student's achievements and/or behavior.

Setup

If using PowerTeacher Gradebook, you can set up a predefined comment bank and define comment lengths. For detailed information, see *Comment Bank* and *Comment Length*.

Entry

Teacher comments can be entered in PowerTeacher and PowerTeacher Gradebook. In PowerTeacher teacher comments can be entered manually and in PowerTeacher Gradebook, teacher comments can be entered manually, or you can use the district's predefined comment banks or your own personal comment bank.

View

Once entered, teacher comments can be viewed in PowerSchool, the PowerSchool Student and Parent portal, PowerTeacher, and PowerTeacher Gradebook.

Comment Bank

Use the comment bank to create and maintain a collection of ready-to-use comments that teachers can then apply in PowerTeacher Gradebook.

Note: The Comment Bank is only available in PowerTeacher Gradebook at this time. For more information about PowerTeacher Gradebook, see *PowerTeacher Gradebook User Guide* available on PowerSource.

How to Create Comments in the Comment Bank

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click **New**. The New Comment page appears.
4. Use the following table to enter information in the fields:

Field	Description
Comment Code	Enter a numeric, alphabetical, or alphanumeric code.
Category	Enter a category to which you want to assign your comment (optional). The comment bank groups the comments by category. **Note:** Categories are not relevant to reports or searches. Comment categories affect only how the comments appear on the Comment Bank page.
Available to	Select an option to display this comment for all schools on this server or only the selected school.
Insert Smart Text	Use smart text to simplify comment entry and personalize standardized comments. Smart text may be inserted into a comment, which will then be auto-populated when the comment is used. For example, rather than entering "Student making steady progress academically," you can personalize the comment by entering "<first name> is making steady progress academically," which translates to "Kate is making steady progress academically." To add smart text to a comment, place the cursor in the **Comment Text** field where you want to add the smart text, and then choose one of the following smart text from the pop-up menu: Student Names • <first name> - translates to PSM_Student.Firstname • <last name, first name> - translates to PSM_Student.LastName, PSM_Student.FirstName • <first name last name> - translates to PSM_Student.Firstname PSM_Student.LastName • <preferred name> - translates to the **Preferred Name** on the Student Info window in PowerTeacher Gradebook; if

	one has not been entered, it translates to PSM_Student.FirstName. • <last name> - translates to PSM_Student.LastName Pronouns based on PSM_Student.Gender • <he/she> - translates to *he* or *she* • <his/her> - translates to *his* or *her* • <him/her> - translates to *him* or *her* • <He/She> - translates to *He* or *She* • <His/Her> - translates to *His* or *Her* • <Him/Her> - translates to *Him* or *Her* The selected smart text then appears within the comment.
Comment Text	Enter the comment text, which can include smart text, hyperlinks and some HTML.

5. Click **Submit**. The Comment Bank page displays the new comment.

How to Edit Comments in the Comment Bank

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the code for the comment you want to edit. The Edit Comment page appears.
4. Edit the information as needed. For field descriptions, see *How to Create Comments in the Comment Bank*.
5. Click **Submit**. The Comment Bank page displays the edited comment.

How to Delete Comments in the Comment Bank

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the code for the comment you want to delete. The Edit Comment page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Comment Length

In PowerTeacher Gradebook, teachers may enter final grade comments and standard final grade comments. Using the comment length setting, you can define the maximum number of characters that may not be exceeded when entering a comment in PowerTeacher Gradebook. If comment length is defined at the district level, the setting is applicable to all schools within the district. If the comment length is defined at the school level, it will override the district setting.

Note: Comment length is only available in PowerTeacher Gradebook. For more information about PowerTeacher Gradebook, see *PowerTeacher Gradebook User Guide* available on PowerSource.

How to Define Final Grade Comment Length

Use the following procedure to define the final grade comment length at the district level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Comment Setup**. The Maximum Comment Character Length page appears.
3. Enter the number of characters (up to 2048) allowed in the **Approximate maximum number of characters** field.
4. Click **Save**. A confirmation message appears.

How to Define Standard Grade Comment Length

Note: Standard grade comments are adjusted individually for each standard. For more information, see *Enter Standards*.

How to Define Final Grade Comment Length

Use the following procedure to define the final grade comment length at the school level.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Final Grade Comments section select the **School Level** option and then enter the number of characters (up to 2048) allowed.

Note: To apply the maximum length defined by the district, select the **Same as district** option. For more information, see *How to Define Maximum Length for Final Grade Comment at District Level*.

5. Click **Submit**. A confirmation message appears.

How to Define Standard Grade Comment Length

Use the following procedure to define the standard grade comment length at the school level.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Standards Comments section select the **School Level** option and then enter the number of characters (up to 4000) allowed.

   Note: To apply the maximum length defined by the district, select the **Same as district standards setup** option. For more information, see *Enter Standards*.

5. Click **Submit**. A confirmation message appears.

Comment Length

In PowerTeacher Gradebook, teachers may enter final grade comments and standard final grade comments. Using the comment length setting, you can define the maximum number of characters that may not be exceeded when entering a comment in PowerTeacher Gradebook. If comment length is defined at the district level, the setting is applicable to all schools within the district. If the comment length is defined at the school level, it will override the district setting.

Note: Comment length is only available in PowerTeacher Gradebook. For more information about PowerTeacher Gradebook, see *PowerTeacher Gradebook User Guide* available on PowerSource.

District Setting

How to Define Final Grade Comment Length

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Comment Setup**. The Maximum Comment Character Length page appears.
3. Enter the number of characters (up to 2048) allowed in the **Approximate maximum number of characters** field.
4. Click **Save**. A confirmation message appears.

How to Define Standard Grade Comment Length

Note: Standard grade comments are adjusted individually for each standard. For more information, see *Enter Standards*.

School Setting

How to Define Final Grade Comment Length

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Final Grade Comments section select the **School Level** option and then enter the number of characters (up to 2048) allowed.

   Note: To apply the maximum length defined by the district, select the **Same as district** option. For more information, see *How to Define Maximum Length for Final Grade Comment at District Level*.

5. Click **Submit**. A confirmation message appears.

How to Define Standard Grade Comment Length

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Standards Comments section select the **School Level** option and then enter the number of characters (up to 4000) allowed.

Note: To apply the maximum length defined by the district, select the **Same as district standards setup** option. For more information, see *Enter Standards*.

5. Click **Submit**. A confirmation message appears.

GPA Calculations

Before running a grade-related report, such as a report card, set up the correct parameters to calculate your school's grade point average. Some schools also choose to factor into the GPA calculation the number of times a student takes a course. Since GPAs are calculated on-the-fly, any changes take effect immediately and affect all schools on the server.

For information about setting the calculation methods and attempt types, see the following sections:

- *GPA Calculation Methods*
- *GPA Attempt Types*

For information about other GPA settings, see *How to Set Other GPA Settings*.

GPA Calculation Methods

Create GPA calculation methods to define the formula and criteria for GPA calculations. PowerSchool includes four standard calculation methods: Simple, Simple Percent, Weighted, and Weighted Percent. You can modify the standard methods to meet your needs or create an unlimited number of additional calculation methods.

Any changes or additions to the list of calculation methods affect all schools on your server. To share a method with schools on other servers, export the method as a template. For more information, see *How to Export GPA Calculation Methods*. If you have the proper permissions, you can remove a calculation method using DDA/DDE. For more information, see *Direct Database Export*.

Once GPA is calculated, the GPA code is used to present GPA information on reports, exports, and student pages. This code always starts with *gpa and is followed by optional parameters that include pairs of names and values.

Examples of the GPA code include:

- **~(*gpa)** returns the cumulative weighted GPA for a student for all years at the school
- **~(*gpa method=weighted type=cumulative grade=12 credittypeCORE)** returns a weighted GPA for core classes for the student's senior year

The following table lists the parameters and values. All parameters except for "method" are overridden by any settings in the calculation method. Parameters and values can be included in the code in any sequence.

Parameter	Description	Example
method	Specifies the name of the specific calculation method that should be used when performing this calculation. If omitted, a method called "weighted" will be used.	method=weighted method=simple method=honors
type	Specifies the type of the calculation. Valid options are: • **Cumulative:** Uses values from historical grades only. • **Current:** Uses the current (not stored) grades sent by PowerTeacher. If "current" is specified, the term, grade, and year attributes, if specified, are ignored; only grades from the in-session school year using the store code specified on the Current Grade Display settings page in District Setup will be used. • **Projected:** Uses the historical grades, plus those projected grades as defined in the calculation method. If omitted, "cumulative" is used.	type=cumulative type=current type=projected
term	One or more term abbreviations. Only grades whose store codes match the specified abbreviations will be used in the calculation. Separate multiple terms with commas. If omitted, any store code	term=S1 term=Q1,Q2,Q3

	is permitted. If one or more term abbreviations are specified but no grade or year, only grades from the current school year are used.	
grade	One or more grade levels. Only grades stored at the specified grade levels will be used in the calculation. Separate multiple grade levels with commas. If omitted, the historical grade range for the school is used.	grade=12 grade=7,8,9
year	One or more four-digit school years. Only grades stored during the specified school years will be used in the calculation. Specify the start year of a school year that spans multiple calendar years. For example, use 2003 for the 2003-2004 school year. Separate multiple years with commas. If omitted, all school years are used.	year=1999 year=1998,1999,2000
credittype	One or more credit types. Only grades that match one or more of the specified credit types will be used in the calculation. Separate multiple credit types with commas. If omitted, grades with any credit type, including no credit type, are used.	credittype=English credittype=ENG,SCI,MATH credittype=Core,Electives
scale	The name of the grade scale to use for this calculation. If a particular letter grade is not present in the specified grade scale, that grade will not be included in the calculation. If the name of the grade scale specified is unrecognized, a scale called Default is used. If omitted, the GPA points from the grade itself are used.	scale=Default scale=Standard scale=Honors

How to Add GPA Calculation Methods

Note: When using projected GPA options, most schools will set the last three options as **Projected grades are stored grades from this [specified] term**, **do not add grade if a grade for this course exists in any term**, and **Stored credit hours use the course's potential credit hours**.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Calculation Methods**. The GPA Calculation Methods page appears.
4. Click **New**. The GPA Calculation Method page appears.
5. Use the following table to enter information in the fields:

Field	Description
Method name	Enter the name of the calculation method. This is the name that will be referred to in GPA codes on other pages in PowerSchool. **Note:** The standard methods Weighted and Simple cannot be renamed.
Description	Enter a description of the calculation method. This description appears on the GPA Calculation Methods page.
Formula	Enter the formula for the method used to determine the result of the calculation. The formula closely resembles a formula used on a spreadsheet. Formulas can include functions, such as average, round, and sum. Use standard operators, such as **+** (addition) and ***** (multiplication) or use logical operators such as **=** (equal to) and **>** (greater than). For more information, see *Formulas for Calculation Methods*.
Calculation type	Choose an option from the pop-up menu: • **Cumulative:** Uses historical grades in the calculation that match the query options specified. • **Current:** Uses current final grades in the calculation, as determined in the School Setup area. A current calculation

	type uses the current final grades from PowerTeacher. Terms, grade levels, and school years are ignored with this calculation type. • **Projected:** Uses historical grades and additional grades as defined in the Projected GPA Options area of the GPA Calculation Method page. A projected calculation type uses historical grades that match the query options specified, plus additional grades determined by any Projected GPA Options. If the calculation type is specified, the type parameter of the GPA code is ignored.
Grade scale	To override the GPA points used in the calculation with a single grade scale, choose the grade scale from this pop-up menu. If a specific letter grade is not found in the grade scale, it is not used in the calculation. Ordinarily, the GPA points associated with the stored grade are used in the calculation. Typically, these are the weighted points. A single grade scale may be specified to override these GPA points with the values in the specified grade scale for this calculation. For example, a stored grade A may have 5 GPA points. That same A may only be worth 4 GPA points on the Standard grade scale. Use scales to calculate complex weighted GPAs for class ranking and honor roll applications, while maintaining a standard 4.0 scale to use on transcripts and college applications. If a grade scale is specified, the scale parameter of the GPA code is ignored.
Terms	Optionally, specify one or more term abbreviations, such as **Q1** or **S2**, to use in the calculation. Separate multiple values with commas. Only grades whose store code matches one of the term abbreviations will be included in the calculation. If the calculation type is Current, terms are ignored. If terms are specified, the term parameter of the GPA code is ignored.
Grade levels	Optionally, specify one or more grade levels to use in the calculation. Use the numeric grade level, such as **11** for eleventh

	grade or **0** for kindergarten. Separate multiple values with commas. Only grades recorded when a student was at the specified grade levels will be included in the calculation. Note that only grades that fall within the historical grade levels specified in the school's record in District Setup may be specified. For example, if the historical range for the school is 912, specifying **8** in the GPA code will return zero. Separate multiple grade levels with commas. If omitted, the historical grade range for the school is used. If the calculation type is Current, grade levels are ignored. If grade levels are specified, the grade parameter of the GPA code is ignored.
School years	Optionally, specify one or more four-digit school years to use in the calculation. For example, enter **2003** for the 2003-2004 school year. Separate multiple values with commas. Only grades recorded during the specified school years will be included in the calculation. School years are closely related to grade levels. As such, if the school year specified translates to a student's grade level that is outside the historical range for the school, zero will be returned. For more information, refer to the "Grade levels" field. If the calculation type is Current, school years are ignored. If school years are specified, the year parameter of the GPA code is ignored.
Credit types	Optionally, specify one or more credit types to use in the calculation. Separate multiple values with commas. Only grades whose credit type matches one of the types specified will be included in the calculation. In case of a current GPA, the course's credit type is used. In case of a cumulative GPA, the credit type specified for the stored grade is used if present; otherwise, the course's credit type is used, if found. If an historical grade does not have a credit type or if the calculation type is Current, the course's credit type is used. If

	credit types are specified, the credittype parameter of the GPA code is ignored.
Only include grades	Select all, none, or a combination of the following checkboxes to narrow the selection of grades used in the calculation: • **That count in GPA:** Includes only historical grades that are specified to be included in the GPA. If the calculation type is Current, only grades from courses and sections that have been flagged to be included in GPA will be included in the calculation. • **That count in class rank:** Includes only historical grades that are specified to be included in the class rank. If the calculation type is Current, only grades from courses and sections that have been flagged to be included in class rank will be included in the calculation. • **That count in honor roll:** Includes only historical grades that are specified to be included in the honor roll. If the calculation type is Current, only grades from courses and sections that have been flagged to be included in honor roll will be included in the calculation. • **With potential credit:** Includes only historical grades that have a potential credit that is not zero. If the calculation type is Current, the potential credit is determined by referring to the corresponding course record. If you deselect all of these checkboxes, all historical grades will be included in the calculation.
Projected grades are	If the calculation type is Projected, choose the type of grades used for projected GPA calculations from this pop-up menu. Projected grades are used to determine grades mid-term, such as when colleges want grades for a twelfth-grade student for admission purposes. • **Current final grades:** Uses current final grades from PowerTeacher, as determined in the School Setup area. • **Stored grades from this term:** Enter the term abbreviation in the blank field.

Do not add grade if	If the calculation type is Projected, choose the term for the grade to use in projected GPA calculations from this pop-up menu: • **A grade for the course exists in any term** • **A grade for the course exists in this term:** Enter the term abbreviation in the blank field. A grade will not be added to the calculation if there already exists an historical grade for the current school year with the same course number for any store code or for the specified store code.
Stored credit hours	If the calculation type is Projected, choose the credit hours option used in projected GPA calculations from this pop-up menu: • **Use actual credit hours** • **Get potential credit from course** If projected grades are historical grades, specify whether to use the actual potential and earned credit stored with the grade or to use the potential credit hours from the corresponding course.

6. Click **Submit**. The GPA Calculation Methods page displays the new method.

How to Edit GPA Calculation Methods

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Calculation Methods**. The GPA Calculation Methods page appears.
4. Click the name of the calculation method you want to edit. The GPA Calculation Method page appears.
5. Edit the information as needed. For field descriptions, see *How to Add GPA Calculation Methods*.
6. Click **Submit**. The GPA Calculation Methods page displays the edited method.

How to Export GPA Calculation Methods

After you create and save a calculation method, you can export the calculation method for use on another PowerSchool server. The option to export the calculation method is available only for saved methods.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Calculation Methods**. The GPA Calculation Methods page appears.
4. Click the name of the calculation method to be exported. The GPA Calculation Method page appears.
5. Click **Export as template**. Save the file as a PowerSchool Template file (*.pst). You can now share the file with other PowerSchool servers.

Formulas for Calculation Methods

Like a formula in a spreadsheet, create formulas for calculation methods in PowerSchool. Formulas consist of functions and arguments, in most cases. Functions are used to perform operations on values, such as calculating a sum or an average, including a grade point average.

There are five categories of functions:

- **Numeric:** Such as rounded, truncated by specified number of places
- **Logical:** Such as "if," "and," "or"
- **Statistical:** Such as average, max, min, median, product, sum
- **Text:** Such as ASCII characters, uppercase, repeat text by specified number of times
- **GPA functions:** Such as number of grades counted in GPA, course numbers, GPA calculation

Results of GPA functions may be arrays of values, which are in braces and separated by commas. For example, the function gpa_percent() may return the result {95.5,83.2,67.8,92} for a student. When you combine the gpa_percent() function with the statistical function average, the formula average(gpa_percent()) returns the result of 84.625 for those four grades.

Embed functions within each other to return the exact result you want. When appending the Round function to the example above to create the formula round(average(gpa_percent()),2), the result is 84.63. The value 2 in the formula indicates the number of digits to round from the decimal point.

You can also use any standard numeric or text operators in a formula, such as **+** (addition), **-** (subtraction), ***** (multiplication), **/** (division), **** (integer division), **^** (exponentiation), **%** (modulo), and **&** (concatenation). The following comparison operators may be used in logical functions: **<** (less than), **<=** (less than or equal to), **>** (greater than), **>=** (greater than or equal to), **=** (equal to), and **<>** (not equal to). For example, use the formula if((average(gpa_percent()))>90,Outstanding Academic Achievement,) to return the phrase

Outstanding Academic Achievement if a student's average percentage for the grades exceeds 90 percent. If not, the formula returns nothing.

For more information about functions, see *Functions*. For a list of functions, see the following sections:

- *Numerical Functions*
- *Logical Functions*
- *Statistical Functions*
- *Text Functions*
- *GPA Functions*

GPA Attempt Types

When calculating a student's GPA, you may want to consider the number of times he or she attempts to take a course. An attempt is a numerical expression to determine the length of the term. The name of the attempt type is the first letter of the term abbreviation, such as Y for year or S for semester. The corresponding number is the numeric expression, using decimals for fragments of the term.

Attempt types are used by the gpa_attempts() function. Attempts for a grade are determined by looking up the first character of the store code or term abbreviation, which is listed with the attempt type. If a match is found, the value specified for the attempt type is returned. If a match is not found, zero is returned as a result of that function. For more information about functions, see *Formulas for Calculation Methods*.

How to Add GPA Attempt Types

If you are using the gpa_attempts() function, set up GPA attempt types to factor the number of times a student takes a course in GPA calculations. Otherwise, it is not necessary to create attempt types.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Attempt Types**. The GPA Attempt Types page appears.
4. Click **New**. The GPA Attempt Type page appears.
5. Use the following table to enter information in the fields:

Field	Description

Name	Enter the name of the attempt type, which is the first letter of the term abbreviation.
Value	Enter the value of the attempt type.
Description	Enter a description for the attempt type.

6. Click **Submit**. The GPA Attempt Types page displays the new attempt type.

How to Edit GPA Attempt Types

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Attempt Types**. The GPA Attempt Types page appears.
4. Click the name of the attempt type you want to edit. The GPA Attempt Type page appears.
5. Edit the information as needed. For field descriptions, see *How to Add GPA Attempt Types*.
6. Click **Submit**. The GPA Attempt Type page displays the edited attempt type.

How to Delete GPA Attempt Types

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Attempt Types**. The GPA Attempt Types page appears.
4. Click the name of the attempt type you want to delete. The GPA Attempt Type page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Set Other GPA Settings

Modify other global settings related to GPA calculations, including the number of decimal places used in credit hours and the ability to prevent modifications of grade scales.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Miscellaneous**. The GPA Misc Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Number of decimal places in credit hours	Enter the number of places from the decimal point to display for the credit hours.

5. Click **Submit**. The Changes Recorded page appears.

Functions

Formulas consist of functions and arguments, in most cases. Functions are used to perform operations on values, such as calculating a sum or an average, including a grade point average (GPA).

There are five categories of functions:

- Numerical functions: Such as rounded, truncated by specified number of places
- Logical functions: Such as "if," "and," "or"
- Statistical functions: Such as average, max, min, median, product, sum
- Text functions: Such as ASCII characters, uppercase, repeat text by specified number of times
- GPA functions: Such as number of grades counted in GPA, course numbers, GPA calculation

Functions must always include the parentheses, even if no arguments are specified. When specifying arguments to functions, be sure to enclose text values in quotation marks.

GPA Samples

Sample GPA formulas are listed below to illustrate the options available.

PowerSchool's traditional cumulative weighted GPA, rounded to 3 decimal places:

> round((gpa_sum(gpa_gpapoints()*gpa_potentialcredit()/sum(gpa_potentialcredit()),3)

PowerSchool's traditional cumulative simple GPA, truncated to 2 decimal places:

trunc((average(gpa_gpapoints()),2)

A value-added GPA:

average(gpa_gpapoints())+sum(gpa_addedvalue())

The number of A grades received:

countof(A,gpa_grade())+countof(A+,gpa_grade())+countof(A-,gpa_grade())

Total of all earned credit:

sum(gpa_earnedcredit())

The text "You are a star student!" if the student received more than 3 A+ grades:

if(countof(A+,gpa_grade())>=3,You are a star student!,)

The list of all letter grades, GPA points, and potential credit values used by the calculation:

gpa_grade()&&gpa_gpapoints()&&gpa_potentialcredit()

The result of one GPA calculation if the student has any grades with added value, or the result of another if not:

if(sum(gpa_addedvalue())>0,gpa_calculation(honors),gpa_calculation(standar
d))

Numerical Functions

Functions are used to perform operations on values, such as rounding numbers to a specified number of digits. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
Abs (Absolute Value)	abs(number)	Returns the absolute value of the number. The result is either a positive number or zero.	abs(-4) returns 4 abs(78) returns 78 abs(0) returns 0

Dec (Decimal) or Frac (Fraction)	dec(number)	Returns the decimal (fractional) part of a real number. The result is always positive.	dec(22.575) returns 0.575 dec(-4.12) returns 0.12
Exp (Exponent)	exp(number)	Returns raised to the power of the number. The constant e equals 2.718281828459, the base of the natural logarithm.	exp(1) returns 2.71828... exp(0.707) returns 2.02811...
Fact (Factorial)	fact(number)	Returns the factorial of the number, equal to 1*2*3*...*number. If the number is negative, returns the #NUM! error value.	fact(5) returns 120 fact(7) returns 5040
Int (Integer)	int(number)	Rounds the number down to the nearest integer. If the number is positive, returns the integer equal to or less than the number. If the number is negative, rounds down to the next lowest whole number.	int(5.76) returns 5 int(-42.123) returns -43
Ln (Natural Log)	ln(number)	Returns the natural logarithm of the number. If the number is negative, returns the #NUM! error value.	round(ln(2.71828),3) returns 1 ln(4) returns 1.3863...
Log2 (Log to Base 2)	log2(number)	Returns the logarithm of the number to base 2. If the number is negative,	log2(43) returns 5.4263...

		returns the #NUM! error value.	
Log10 (Log to Base 10)	log10(number)	Returns the logarithm of the number to base 10. This is the inverse of the number E in scientific notation. If the number is negative, returns the #NUM! error value.	log10(100000) returns 5
Log	log(number{,base})	Returns the logarithm of the number to a base. If the base is omitted, uses 10. If the number or base is negative, returns the #NUM! error value.	log(10000) returns 4 log(10000,6) returns 5.1404...
Mod (Modulo)	mod(number,divisor)	Returns the remainder when the number is divided by the divisor. The result has the same sign as the value of the number being divided. If the number or divisor is a real number, it will be rounded before calculating the modulo.	mod(5,-2) returns 1 mod(23,7) returns 2
Pi	pi()	Returns pi, the ratio of a circle's circumference to its diameter.	pi() returns 3.141592653589793116
Power	power(number,power)	Returns the result of the number raised to a power.	power(2,8) returns 256 power(14,0.5) returns 3.7417...

Rand (Random)	rand({number})	Returns a random number between 0 and the number. If the number is omitted, the returned value is between 0 and 1.	rand() returns 0.8462... rand(50) returns 31.4896...
Round	round(number,digits)	Returns a number rounded to the specified number of digits from the decimal point. If digits is positive, it specifies the number of digits to the right of the decimal point. If negative, it specifies the number of digits to the left of the decimal point.	round(59.72893,3) returns 59.729 round(115925.45,-3) returns 116000
Sign	sign(number)	Returns 1 when the number is positive, -1 when it is negative, and 0 when it is zero.	sign(42) returns 1 sign(-827.32) returns -1 sign(0) returns 0
Sqrt (Square Root)	sqrt(number)	Returns the positive square root of the number. If the number is negative, returns the #NUM! error value.	sqrt(25) returns 5 sqrt(86) returns 9.2736...
Trunc (Truncate)	trunc(number{,digits})	Truncates the number by removing the decimal (fractional) part of the number. If digits is specified, it specifies the precision (number of decimal places) to truncate.	trunc(548.14687) returns 548 trunc(3.4583,2) returns 3.45

Logical Functions

Functions are used to perform operations on values, such as returning a specified number if certain conditions are met. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
And	and(logical1{,logical2,...})	Returns 1 if all of the arguments are true (not zero), or 0 if any argument is false (zero).	and(1,0,1,43) returns 0 and((5=5),1) returns 1

If	if(logical,true_value,false_value)	Returns the true_value if the logical argument is true (not zero), or the false_value if the logical argument is false (zero).	if(1,100,0) returns 100
			
			if(gpa_count()>20,Lots,Few) returns Few

IsBlank	isblank(text)	Returns 1 if the text is blank or 0 if it is a number or contains text.	isblank(83.2) returns 0 isblank(test) returns 0 isblank() returns 1

IsEven	iseven(number)	Returns 1 if the number is zero or evenly divisible by 2, or 0 if it is not.	iseven(42) returns 1 iseven(-17) returns 0
IsLogical	islogical(value)	Returns 1 if the argument can be interpreted as a logical value (0 or 1), or 0 if it cannot.	islogical(0) returns 1 islogical(gpa) returns 0
IsNumber	isnumber(value)	Returns 1 if the argument is a number, or 0 if it is text.	isnumber(3.412) returns 1 isnumber(A+) returns 0
IsOdd	isodd(number)	Returns 1 if the number is not zero or evenly divisible by 2, or 0 if it is.	isodd(42) returns 0 isodd(-17) returns 1
IsText	istext(value)	Returns 1 if the argument is text, or 0 if it is a number.	istext(0) returns 0 istext(gpa) returns 1
Not	not(logical)	Reverses the logic of the logical value: Returns 1 if logical is false (zero), or 0 if	not(1) returns 0 not(5=4) returns 1

		logical is true (not zero).	
Or	or(logical1{,logical2,...})	Returns 1 if any of the arguments are true (not zero), or 0 if all are false (zero).	or(0,0,1,0) returns 1 or((5=4),0) returns 0

Statistical Functions

Functions are used to perform operations on values, such as calculating a sum or an average. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
Average or Avg or Mean	average(number1{,number2, ...})	Returns the average (arithmetic mean) of the numeric arguments. The arguments may be individual numbers or results of functions that	average(12,18,25,15) returns 17.5 average(gpa_percent()) returns 80.5

		return arrays of numbers.	
Count	count(value1{,value2, ...})	Returns the number of arguments given. The arguments may be individual values or results of functions that return arrays of values.	count(12,18,25,15) returns 4 count(gpa_percent()) returns 5
CountOf	countof(search_value,value1 {,value2, ...})	Returns the number of occurrences of search_value in the remaining arguments. The arguments may be individual values or results of functions that return arrays of values.	countof(3.5,4,3.75,3.5,3,3, 4,3,2,3.5,2.5,3) returns 2 countof(A,gpa_grade()) returns 1
Distinct	distinct(value1{,value2, ...})	Returns an array of the unique values found in the arguments. The	distinct(4,3.75,3.5,3,3, 4,3,2,3.5,2.5,3) returns {4,3.75,3.5,3,2,2.5} distinct(gpa_grade()) returns {A,B+,B,C+,F}

		arguments may be individual values or results of functions that return arrays of values.	
Geomean (Geometric Mean)	geomean(number1 {,number2, ...})	Returns the geometric mean of the positive numeric arguments. The arguments may be individual numbers or results of functions that return arrays of numbers. If any argument is negative, returns the #NUM! error value.	geomean(12,18,25,15) returns 16.8702 ... geomean(gpa_percent()) returns 79.0972 ...
Harmean (Harmonic Mean)	harmean(number1 {,number2, ...})	Returns the harmonic mean of the positive numeric arguments, the reciprocal of the arithmetic mean of	harmean(12,18,25,15) returns 16.2896 ... harmean(gpa_percent()) returns 77.5126 ...

		reciprocals. The arguments may be individual numbers or results of functions that return arrays of numbers. If any argument is negative, returns the #NUM! error value.	
Max (Maximum)	max(number1 {,number2, ...})	Returns the largest number in the list of arguments. The arguments may be individual numbers or results of functions that return arrays of numbers.	max(12,18,25,15) returns 25 max(gpa_percent()) returns 96.2
Maxa (Maximum Alphabetic)	maxa(value1 {,value2, ...})	Sorts the arguments alphabetically, then returns the last value. The arguments may be individual	maxa(red,white,blue,green) returns white

		values or results of functions that return arrays of values.	
Median	median(number1 {,number1, ...})	Returns the median of the numeric arguments. The median is the number in the middle; half of the numbers are greater than the median, half are less. If there is an even number of arguments, returns the average of the two numbers in the middle.	median(1,2,3,4,5) returns 3 median(1,2,3,4,5,6) returns 3.5 median(gpa_gpapoints()) returns 3.333
Min (Minimum)	min(number1 {,number2, ...})	Returns the smallest number in the list of arguments. The arguments may be individual numbers or results of functions that	min(12,18,25,15) returns 12 min(gpa_percent()) returns 54.8

		return arrays of numbers.	
Min (Minimum Alphabetic)	mina(value1 {,value2, ...})	Sorts the arguments alphabetically, then returns the first value. The arguments may be individual values or results of functions that return arrays of values.	mina(red,white,blue,green) returns blue
Mode	mode(value1 {,value2, ...})	Returns the mode of the arguments. The mode is the most frequently occurring, or repetitive, value. If no value repeats, returns #N/A. In the case of a uniform distribution, or multiple modes, returns only one value. The arguments may be individual values or	mode(12,18,25,15) returns #N/A mode(12,18,25,15,19, 14,18,9,16,20) returns 18 mode(gpa_gpagrade()) returns B

		results of functions that return arrays of values.	
Product	product(number1 {,number2, ...})	Multiplies all the numeric arguments and returns the result. The arguments may be individual numbers or results of functions that return arrays of numbers.	product(12,18,25,15) returns 8100
Range	range(number1 {,number2, ...})	Returns the difference between the largest and smallest numeric arguments. The arguments may be individual numbers or results of functions that return arrays of numbers.	range(12,18,25,15) returns 13 range(gpa_gpapoints()) returns 4
Stdev (Standard Deviation)	stdev(number1,number2 {,number3, ...})	Calculates the standard deviation of a	stdev(12,18,25,15) returns 5.56778 ...

		population based on a sample given as a list of arguments using the nonbiased or n-1 method. A standard deviation is a measure of how widely values are dispersed from the average value (arithmetic mean). The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents the entire population, use Stdevp.	stdev(gpa_percent()) returns 15.6962 ...
Stdevp (Standard Deviation Population)	stdev(number1,number2 {,number3, ...})	Calculates the standard deviation of an entire population given as a list of arguments using the	stdev(12,18,25,15) returns 4.8218 ... stdev(gpa_percent()) returns 14.0391 ...

		biased or n method. A standard deviation is a measure of how widely values are dispersed from the average value (arithmetic mean). The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents a sample of the population, use Stdev.	
Sum	sum(number1 {,number2, ...})	Adds all the numeric arguments and returns the result. The arguments may be individual numbers or results of functions that return arrays of numbers.	sum(12,18,25,15) returns 70 sum(gpa_potentialcredit()) returns 4

Var (Variance)	var(number1,number2 [,number3, ...})	Returns the variance of a population based on a sample given as a list of arguments. The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents the entire population, use Varp.	var(12,18,25,15) returns 31 var(gpa_gpapoints()) returns 2.5138 ...
Varp (Variance Population)	var(number1,number2 {,number3, ...})	Returns the variance of an entire population given as a list of arguments. The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents a sample of the	varp(12,18,25,15) returns 23.25 varp(gpa_gpapoints()) returns 2.0110 ...

		population, use Var.	

Text Functions

Functions are used to perform operations on values, such as joining two strings of text together. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
Char (Character)	char(number)	Returns the ASCII character corresponding to the number. The ASCII set used is the Macintosh extended ASCII set.	char(65) returns A char(92) returns \
Code (ASCII Code)	code(text)	Returns the numeric ASCII code of the first character in the text. The ASCII set used is the Macintosh extended ASCII set.	code(A) returns 65 code(gpa is fun) returns 103

Concatenate or Concat	concatenate(text1{,text2,...})	Joins several strings of text into one string of text.	concatenate(gpa,is,fun) returns gpaisfun concatenate(gpa_count(),,grades) returns 29 grades
Exact	exact(text1,text2)	Returns 1 if both arguments are identical in case and characters, or 0 if different.	exact(GPA,gpa) returns 0 exact(Mr. Smith,Mr. Smith) returns 1
Left	left(text{,num_characters})	Returns the first (leftmost) character or characters in the text. If num_characters is omitted, returns 1 character.	left(GPA) returns G left(Mr. Smith,3) returns Mr.
Len (Length)	len(text)	Returns the number of characters in the text, including spaces, numbers, and special characters.	len(GPA) returns 3 len(Mr. Smith) returns 8
Lower	lower(text)	Converts any uppercase characters in the text to lowercase.	lower(GPA) returns gpa lower(Mr. Smith) returns mr. smith

Mid (Middle)	mid(text,start_position, num_characters)	Returns a specific number of characters from the text starting at the position you specify.	mid(GPA,1,1) returns P mid(Mr. Smith,3,4) returns . Smi
Proper	proper(text)	Capitalizes the first letter and any letter following a non-letter in the text.	proper(GPA) returns Gpa proper(2-cent's worth) returns 2-Cent'S Worth
Replace	replace(text,start_position, num_characters,new_text)	Replaces num_characters characters of text with the new_text starting at the position you specify.	replace(gpa codes,4,5,is fun) returns gpa is fun replace(Mr. Smith,1,3,Mrs.) returns Mrs. Smith
Rept (Repeat)	rept(text,number_times)	Repeats the text the specified number of times.	rept(gpa is fun ,5) returns gpa is fun gpa is fun gpa is fun gpa is fun gpa is fun rept(-,average(gpa_gpapoints())*4) returns -----------
Right	right(text{,num_characters})	Returns the last (rightmost) characters in the text. If num_characters is omitted,	right(GPA) returns A right(Mr. Smith,4) returns mith

		returns 1 character.	
Trim	trim(text)	Removes leading, trailing, and extra spaces from the text.	trim(gpa is fun) returns gpa is fun
Upper	upper(text)	Converts any lowercase characters in the text to uppercase.	upper(gpa is fun) returns GPA IS FUN upper(Mr. Smith) returns MR. SMITH

GPA Functions

Functions are used to perform operations on values, such as returning the number of grades used to determine a student's GPA. The functions in this category are listed alphabetically. For more information about GPA functions, see PowerSource.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
GPA_AddedValue	gpa_addedvalue()	Returns a numeric array listing the added value for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_addedvalue() returns {0,0.02,0,0,0}

GPA_Attempts	gpa_attempts()	Returns a numeric array listing the attempts for each grade used in the GPA calculation. The attempts are determined by comparing the first character of the store code to a lookup table defined in District Setup. If the character is not found in the lookup table, a zero is used. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_attempts() returns {1,1,2,2,2}
GPA_Calculation	gpa_calculation(text)	Returns the result of the GPA calculation method whose name is specified.	gpa_calculation(weighted) returns 3.254
GPA_Concat	gpa_concat(formula)	Evaluates the formula once for every grade used in the GPA calculation and returns a concatenated string of the results. When used inside gpa_concat(), the following functions return an individual	gpa_concat(if(left(gpa_grade())=B,*,)) returns **

		value instead of an array: • gpa_addedvalue() • gpa_attempts() • gpa_coursenumber() • gpa_earnedcredit() • gpa_gpapoints() • gpa_grade() • gpa_gradelevel() • gpa_percent() • gpa_potentialcredit() • gpa_storecode() • gpa_termid() **Note:** A gpa_concat() or gpa_sum() function cannot be used within the formula.	
GPA_Count	gpa_count()	Returns the number of grades used in the GPA calculation. Functionally equivalent to count(gpa_grade()), but faster.	gpa_count() returns 8
GPA_CountSchoolYears	gpa_countschoolyears()	Returns the number of unique school years (not grade	gpa_countschoolyears() returns 2

		levels) for the grades used in the GPA calculation.	
GPA_CountUniqueCourses	gpa_countuniquecourses()	Returns the number of unique courses (based on course number) for the grades used in the GPA calculation.	gpa_countuniquecourses() returns 6
GPA_CountYearTerms	gpa_countyearterms()	Counts the number of unique store codes in each school year, then returns a grand total.	gpa_countyearterms() returns 4
GPA_CourseNumber	gpa_coursenumber()	Returns a text array listing the course numbers for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_coursenumber() returns {MA1001,SC2001, FA540,LS105, PE200}
GPA_EarnedCredit	gpa_earnedcredit()	Returns a numeric array listing the earned credit hours for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_earnedcredit() returns {0,0.5,0.5,1,0}

GPA_GPAPoints	gpa_gpapoints()	Returns a numeric array listing the gpa points for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_gpapoints() returns {4,3.5,3.333,2.5,0}
GPA_Grade	gpa_grade()	Returns a text array listing the letter grade for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_grade() returns {A,B+,B,C+,F}
GPA_GradeLevel	gpa_gradelevel()	Returns a numeric array listing the grade level for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_gradelevel() returns {9,9,9,10,10}
GPA_Percent	gpa_percent()	Returns a numeric array listing the percentage for each grade used in the GPA calculation. If used within	gpa_percent() returns {96.2,88.5,84,79,54.8}

		gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	
GPA_PotentialCredit	gpa_potentialcredit()	Returns a numeric array listing the potential credit hours for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_potentialcredit() returns {0,0.5,0.5,1,1}
GPA_StoreCode	gpa_storecode()	Returns a text array listing the store code for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_storecode() returns {Q1,Q2,S1,S1,S2}
GPA_Sum	gpa_sum(formula)	Evaluates the formula once for every grade used in the GPA calculation and returns the numeric total of the results. When used inside gpa_concat(), the following functions	gpa_sum(gpa_gpapoints() *gpa_potentialcredit()) returns 5.9165

		return an individual value instead of an array: - gpa_addedvalue() - gpa_attempts() - gpa_coursenumber() - gpa_earnedcredit() - gpa_gpapoints() - gpa_grade() - gpa_gradelevel() - gpa_percent() - gpa_potentialcredit() - gpa_storecode() - gpa_termid() **Note:** A gpa_concat() or gpa_sum() function cannot be used within the formula.	
GPA_TermID	gpa_termid()	Returns a numeric array listing the term ID for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_termid() returns {1004,1005,1001, 1101,1102}

Grade Scales

Create multiple grade scales and assign them to different courses or sections. For example, grades given for AP Calculus count more towards a student's GPA than grades for Basic Math. Assign the two courses to different grade scales. For more information about assigning grade scales to courses, see *Course Grade Scales*.

The grade scales you define become the set of grades that are possible to use at all schools on your PowerSchool system. The value of a grade is determined when an historical grade is given to a student taking a particular course. Even if the grade scale for that course changes, the values of that student's grade do not change.

Grade scales include color levels for each item in the scale. Grade scale color levels provide a visual indicator of student progress that can be consistent and aligned across all different types of grade scales. These color levels are used in other parts of PowerSchool, such as in the At Risk Student Dashboard in PowerSchool or on the Class Progress page in PowerTeacher Pro. When you create a new grade scale, select the number of colors associated to the grade scale. Once you generate the grade scale table, select the color level for each grade. Available colors include dark green, green, yellow, orange, and red. Depending on the number of items in the grade scale, the color levels may include different shades of these colors.

In an A, B, C, D, F grade scale:

- Dark green - Equates to a grade of A
- Green - Equates to a grade of B
- Yellow - Equates to a grade of C
- Orange - Equates to a grade of D
- Red - Equates to a grade of F

These color levels appear in PowerTeacher Pro.

Alpha Grade Scales

An alpha grade scale uses letter grades such as A, B, and C+ or E, S, and N, or descriptive grades such as Excellent, Satisfactory, and Unsatisfactory. With the exception of some new options, alpha grade scales are largely unchanged for PowerTeacher Pro.

Common Examples of Alpha Grade Scales:

- Traditional scales - A,B,C,D,F
- Elementary school - Outstanding, Satisfactory, Need Improvement (O,S,N), or alpha-based proficiency scale: Exceeds, Meets, Approaching, Basic (E,M,A,B)

Note: If you are creating grade scales using numbers, use the Numeric Grade Scales process. For more information, see Numeric Grade Scales.

- GPA and Credit - Show or hide these fields as needed.
- Term Weighting - Average final grades or term weighting points. Show or hide these fields as needed.

  Note: If your school uses average final grades, you may not need to using term weighting points in PowerTeacher Pro.

How to Create an Alpha Grade Scale

You must be signed in to the District office.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click **New**. The New Grade Scale page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name	Enter a name for the grade scale.
Type	Select **Alpha** from the pop-up menu.
Use	Select an option from the pop-up menu. This determines where this grade scale will be used. • **Traditional Grade** • **Standards** • **Traditional Grade and Standards**
Description	Enter a description for the grade scale.
Use Special Codes	Create a grade scale before adding special codes. Teachers can manually assign special codes and final course grades, but they are never calculated in to the final grade. Special

	codes can also be made available to use on assignments, and act as district pre-created Gradebook Score Codes for the teacher. For example: • A teacher manually assigns Incomplete for a final grade, but the assignment scores never calculate into Incomplete. • A teacher manually enters an assignment score code of ABS to indicate that the student was absent.
Scale Used in GPA and Course Credit	Selected by default. Deselect the checkbox if your school does not use GPA and Course Credit with this scale. **Note:** This option is not available for use with standards.
Show Term Weighting and Average Final Grades (AFG)	Deselected by default. Select the checkbox to display Term Weighting Points when editing this grade scale. **Note:** If you were using average final grades, you may be able to do that in PowerTeacher Pro with term weighting points when you want to average across multiple classes. Otherwise, the new term weighting points will allow you to calculate grades based on points rather than percent.
Repeated Course Grade Suppression Policy	Choose the repeated course grade suppression policy you want to enable from the pop-up menu. If enabled, stored grades associated to this grade scale will be evaluated based on the selected repeated course grade suppression policy during the permanently store grades process. **Note:** The default is set to **None** indicating that stored grades associated to this grade scale will be included in the stored grades process but will be excluded from the repeated course grade suppression portion of the process. **Examples** For example, you may want to create separate grade scales for courses such as these:

	• The following example illustrates when you might want to allow repeated course grade suppression. The high school Algebra course is a requirement for students wanting to apply to college. Some students may need to repeat the course in order to receive a passing grade and those grades should be evaluated for repeated course grade suppression. • The following example illustrates when you might want to not allow repeated course grade suppression. The high school Band course is expected to be repeated by students each year and those grades should not be evaluated for repeated course grade suppression. **Note:** For more information, see *Repeated Course Grade Suppression*.
Enter Starting Grade Scale Items	Enter the grades you would like to populate in the Grade Scale table. Use commas to separate values, for example A+, A, A-, B+, B, B-, etc. When generated, the Grade Scale table will appear at the bottom of the page and will populate with the values you enter here.
Starting Number of Colors	Select the number of colors you want to appear associated to this grade scale. Grade scale color levels provide a visual indicator of student progress that can be consistent and aligned across all different types of grade scales.

5. Click **Generate Table**. The Grade Scale details table appears.
6. To create additional grades for this scale, click **Add Grade**. A new row in the Grade Scale details table appears.
7. Use the following table to enter information in the fields:

Field	**Description**
Grade	Required field. The information you entered in the Starting Grade Scale Items field appear.

	Enter the grade that you want to create for this grade scale, such as **A**, **B**, or **F**.
Description	Enter a description of the grade in the field, such as Superior. This description appears on grading reports.
Counts in GPA	Select the checkbox if this grade counts in the GPA. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Grade Points (GPA)	Enter the number of grade points to include in the GPA. You can enter up to and including the number 200. For example, an A could be worth 4.0 grade points, a B worth 3.0 grade points, and an F worth 0 grade points. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Added Value	Select the checkbox if teachers can enter a value for this grade that exceeds the normal grade points. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Grad Credit	Select the checkbox to determine that this grade earns credit towards graduation requirements. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Teacher Scale	Select the checkbox to indicate that teachers are allowed to use this grade scale.
Cutoff %	Required field. Enter the lowest percentage students can earn to receive this grade. For example, if you enter 93 for an A, then students must earn at least 93% of the total points to receive an A. The system uses the next highest cutoff percentage you define for a different

	grade to determine the highest percent grade students can earn to receive this grade. **Note:** This is a suggested cutoff for your teachers to use. Teachers can define their own cutoff percentages for this grade in PowerTeacher Gradebook if the selected grade scale is editable.
Grade Value	Required field. This field indicates the value of a letter grade when teachers give letter grades instead of numeric grades. Enter a number for the value of the letter grade; usually, this is in the middle of the range for the grade, such as 88 for a B+.
Color Levels / Edit	Use the pop-up menus to assign color levels to the grade. Divide the grade scale into 2-5 color groups for easy color identification for teachers. The colors appear in PowerTeacher Pro graphs and charts and display clear demarcation of proficiency.
Points	If your school will assign grades a GPA point value AND a grade averaging point value, use this field to indicate a grade averaging point value. Otherwise, leave blank. This field is used only when the **Use Alternative Grade Points in Calculation** checkbox on the Average Final Grades page is selected.
Cutoff Points	Use this field to indicate the lowest points students can earn to receive this grade. For example, if you enter 4.0 for an A, then students must earn at least 4.0 points to receive an A. The system uses the next highest cutoff points you define for a different grade to determine the highest points grade students can earn to receive this grade.
Exclude (AFG)	Select the checkbox to exclude this grade from the average final grade.
Action	Click the minus button to remove the grade from the grade scale.
Default Zero Cutoff	Select a grade from the pop-up menu to use as the default if no cutoff percentage is defined.

8. Click **Save**. The alpha grades scale is created.

Numeric Grade Scales

While numeric conversion scales already exist for standards grade calculation in PowerTeacher Gradebook, numeric grade scales are new for use in PowerTeacher Pro and can be used for both course grades and standards grades. As indicated at the beginning of this document, existing numeric conversion scales will be migrated as numeric grade scales.

Like a numeric conversion scale, a numeric grade scale is a number range (for example, 1-4). Usually, each number represents a level of proficiency. For example, 4=advances, 3=proficient, 2=approaching, 1=below. Numeric grade scales now allow calculations with just those numbers. For example, scores of 3 and 4 will average to 3.5. No percent conversion is needed.

Some districts want intermediary levels between whole numbers, for example 4, 3.5 and 3, or 4, 3+, and 3. You can do this without needing every other decimal. An example of a 1-4 scale with plus is 4, 3+, 3, 2+, 2, 1+,1. Alternately, you can include multiple decimal values. For example, a one decimal scale would have 3, 3.1, 3.2, 3.3, etc.

Special grades, like W or I, can still be used by creating a Special Codes grade scale. For more information, see Special Codes.

How to Create a Numeric Grade Scale

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click **New**. The New Grade Scale page appears.
4. Use the following table to enter information in the fields:

Type	**Description**
Name	Enter a name for the grade scale.
Type	Select **Numeric** from the pop-up menu.
Use	Select an option from the pop-up menu. This determines where this grade scale will be used. • **Traditional Grade**

	• **Standards** • **Traditional Grade and Standards**
Description	Enter a description for the grade scale.
Use Special Codes	Create a grade scale before adding special codes. Teachers can manually assign special codes and final course grades, but they are never calculated in to the final grade. Special codes can also be made available to use on assignments, and act as district pre-created Gradebook Score Codes for the teacher. For example: • A teacher manually assigns Incomplete for a final grade, but the assignment scores never calculate into Incomplete. • A teacher manually enters an assignment score code of ABS to indicate that the student was absent.
Range	Enter the minimum and maximum values of this grade scale.
Scale Used in GPA and Course Credit	Selected by default. Deselect the checkbox if your school does not use GPA and Course Credit with this scale.
Include	Select a character from the pop-up menu to include in the grade scale values. Examples for each option appear below the pop-up menu when selected. If you are using this grade scale for standards, a **Decimals** pop-up appears. Select the decimal place value you want included in the grade scale.
Show Term Weighting and Average Final Grades (AFG)	Deselected by default. Select the checkbox to display Term Weighting Points when editing this grade scale. **Note:** If you were using average final grades, you may be able to do that in PowerTeacher Pro with term weighting points when you want to average across multiple classes. Otherwise, the new term

	weighting points will allow you to calculate grades based on points rather than percent.
Repeated Course Policy	Choose the repeated course grade suppression policy you want to enable from the pop-up menu. If enabled, stored grades associated to this grade scale will be evaluated based on the selected repeated course grade suppression policy during the permanently store grades process. **Note:** The default is set to **None** indicating that stored grades associated to this grade scale will be included in the stored grades process but will be excluded from the repeated course grade suppression portion of the process. **Note:** For more information, see *Repeated Course Grade Suppression*.
When Converting Other Scales Into This Scale	By default, numeric grade scales use cutoff values. You can edit these values when you generate the grade scale table.
Starting Number of Colors	Select the number of color levels you want to start with when creating this grade scale.

5. Click **Generate Table**. The Grade Scale details table for the new grade scale appears.
6. Use the following table to enter information in the fields:

Field	Description
Grade	The Min and Max Range you entered appears in this column.
Description	Enter a description of the grade in the field, such as Superior. This description appears on grading reports.
Numeric Cutoff	Use this field to indicate the lowest points students can earn to receive this grade. For example, if you enter 4.0 for an A, then students must earn at least 4.0 points to receive an A. PowerSchool uses the next highest cutoff points you define for a

	different grade to determine the highest points grade students can earn to receive this grade.
Numeric Value	This field indicates the value of a numeric grade when teachers give letter grades instead of numeric grades. Enter a number for the value of the letter grade; usually, this is in the middle of the range for the grade, such as 88 for a B+.
Color Levels / Edit	Use the pop-up menus to assign color levels to the grade. Divide the grade scale into 2-5 color groups for easy color identification for teachers. The colors appear in PowerTeacher Pro graphs and charts and display clear demarcation of proficiency.
Cutoff % To Numeric	Enter the cutoff percent value to use between grade scales.
% Value	Enter the value to use when this grade is marked on an assignment.

7. Click **Save**. The numeric grade scale is created.

Special Codes

Special Codes are new for PowerTeacher Pro, and while similar in some respects to Score Codes in PowerTeacher Gradebook, they have extended functionality. A special code may be used in conjunction with any grade scale you create. For example, you may create a special codes scale that includes alphanumeric codes, or you may create one that includes codes such as "Inc" for incomplete, or "Abs" for absent. When you associate a regular grade scale with a special codes scale, teachers can access all of the items on both scales.

Teachers can assign special codes as final course grades. For example, a teacher can use the special code to mark a final course grade as NC (no credit). However, special codes are never the result of a final grade calculation.

Special codes can also be used for assignment scoring. For example, a teacher marks an assignment as ABS to indicate that the student was absent for the assignment or uses another code to award a pre-defined percentage of the total points possible.

How to Create a Special Codes Grade Scale

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click **New**. The New Grade Scale page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name	Enter a name for the grade scale.
Type	Select **Special** from the pop-up menu.
Description	Enter a description for the grade scale.
Range	Enter the minimum and maximum values of this grade scale.
Scale Used in GPA and Course Credit	Selected by default. Deselect the checkbox if your school does not use GPA and Course Credit with this scale.
Show Term Weighting and Average Final Grades (AFG)	Deselected by default. Select the checkbox to display Term Weighting Points when editing this grade scale. **Note:** If you were using average final grades, you may be able to do that in PowerTeacher Pro with term weighting points when you want to average across multiple classes. Otherwise, the new term weighting points will allow you to calculate grades based on points rather than percent.
Enter Starting Grade Scale Items	Enter the grades you would like to populate in the Grade Scale table. Use commas to separate values, for example Abs,Inc,NC. When generated, the Grade Scale table will appear at the bottom of the page and will populate with the values you enter here.
Starting Number of Colors	Select the number of color levels you want to start with when creating this grade scale.

5. Click **Generate Table**. The Grade Scale details table for the new grade scale appears.
6. Use the following table to enter information in the fields:

Field	Description
Sort	Use the arrows to move the row up or down. This determines the order in which the special codes appear in PowerTeacher Pro.
Codes	Displays the Starting Grade Scale Items you entered.
Description	Enter a description of the grade in the field, such as Superior. This description appears on grading reports.
Use As a Final Grade	Select the checkbox if this special code can be used as the final grade.
Final Grade % Value	Enter a percentage value to assign for this special code when used as a final grade.
Final Numeric Value	Enter a numeric value to assign for this special code when used as a final grade.
Counts in GPA	Select the checkbox if the final grade value counts in the student's GPA. **Note:** This field displays if Description is selected.
Grade Points (GPA)	Enter the point value for this special code for the GPA. Enter the number of grade points to include in the GPA. You can enter up to and including the number 200. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Added Value	Select the checkbox if teachers can enter a value for this grade that exceeds the normal grade points. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Grad Credit	Select the checkbox if this grade counts toward graduation credit.

	Note: This field displays if **Scale Used in GPA and Course Credit** is selected.
Alt. Grade Points	Enter alternate grade points to assign to this special code. If your school assigns grades a GPA point value AND a grade averaging point value, use this field to indicate a grade averaging point value. Otherwise, leave blank. This field is used only when the **Use Alternative Grade Points in Calculation** checkbox on the Average Final Grades page is selected. **Note:** This field displays if **Show Term Weighting and Average Final Grades (AFG)** is selected.
Exclude (AFG)	Select the checkbox to exclude this special code from the average final grade calculation. **Note:** This field displays if **Show Term Weighting and Average Final Grades (AFG)** is selected.
Color Levels	Use the pop-up menus to assign color levels to the grade. Divide the grade scale into 2-5 color groups for easy color identification for teachers. The colors appear in PowerTeacher Pro graphs and charts and display clear demarcation of proficiency.
Final Grade/Score is Exempt	Select the checkbox to make the assignment score exempt from calculating in to the final grade.
Final Grade/Score Incomplete	Select the checkbox to automatically assign the Incomplete attribute to the assignment score when using this special code in PowerTeacher Pro.
Use On Assignments	Select the checkbox to enable this special grade to be used to mark assignments.
Assignment % Value	Enter a percent value for this special code. This setting only applies when related to an alpha grade scale.
Assignment Numeric Value	Use the pop-up menu to select the numeric value for the assignment.

	• Select **Min** to use the minimum value of the associated numeric grade scale. • Select **Max** to use the maximum value of the associated numeric grade scale. • Select **Custom**, and then enter a custom value in the field provided. This setting only applies when related to a numeric grade scale.
Is Late	Select the checkbox to automatically assign the Late attribute to the assignment score when using this special code in PowerTeacher Pro.
Is Missing	Select the checkbox to automatically assign the Missing attribute to the assignment score when using this special code in PowerTeacher Pro.
Is Collected	Select the checkbox to automatically assign the Collected attribute to the assignment score when using this special code in PowerTeacher Pro.
Is Absent	Select the checkbox to automatically assign the Absent attribute to the assignment score when using this special code in PowerTeacher Pro.
Action	Click the minus button to remove the grade scale.

7. Click **Save**. The special codes grade scale is created.

How to Edit a Grade Scale

Edits to any grade scales affect the grade scales for all of the schools on your system.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click the **Pencil** icon for the grade scale you want to edit. The Edit Grade Scale: [grade scale] page appears.
4. Edit the information as needed. For field descriptions, see the respective *How to Create a Grade Scale* section above.
5. Click **Save**. The Grade Scales page displays the edited grade scale.

How to Delete a Grade Scale

Deleting a grade scale does not affect grades that have already been assigned. The system uses the default grade scale for any course or section that is no longer associated with a grade scale.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click the **Pencil** icon for the grade scale you want to edit. The Edit Grade Scale: [grade scale] page appears.

   Note: You cannot delete the default grade scale.

4. To remove a grade scale item:
   a. In the Grade Scale details table, click the **Minus (-)** icon for the item you want to remove.
   b. Click **Save**. A confirmation message appears.
5. To remove the grade scale:
   a. Click **Delete**.
   b. Click **Confirm Delete**. The Grade Scales page appears.

Import Grade Scales

You can also import additional grade scales into PowerSchool to make them available for teachers to use in PowerTeacher Pro.

For more information, see *Data Import Manager* in the PowerSchool online help, or the *Import/Export User Guide* for PowerSchool 10.x, available on PowerSource.
The Data Import Manager page is accessible via **Start > System > Page and Data Management > Data Import Manager**.

Grade Scales Import

To import grade scales, select **Grade Scales: District List** on the Data Import Manager page.

The following fields are required in the data import file when creating new grade scales via import:

- **ID**
- **GradescaleId**
- **Name**

- **GradescaleType**
- **Grade_Points**
- **CutoffPercentage**
- **Value**
- **NumericMin**
- **NumericMax**
- **NumericCutoff**
- **NuermicValue**
- **CutoffPoints**

The ID field is required when updating existing grade scales via import.

Working with Standards in PowerSchool

Before using standards in PowerSchool, understand what your district wants and is expected to report to a board of education, superintendent, or the state Department of Education (DOE). There is no need to define different standards or benchmarks at every grade level if you are not expected to report that information. For example, the Wyoming DOE requires schools to report student progress at the fourth-, eighth-, and eleventh-grade levels. Schools in Wyoming often select to have all teachers match their assignments to only those benchmarks unless their local DOE requires it at every grade level. Kindergarten through fourth-grade teachers can align to the fourth-grade set of benchmarks; fifth- through eighth-grade teachers can align to the eighth-grade set; and so on.

Important: If each grade level does use and report on different standards, then standards should be created by grade level.

Grading Methods

The conversion scales are applied in the grading methods listed in the following table. In specialized cases, these methods need special values in order to translate into a different scale.

Grading Method	Description
Values and Cut-offs	This is the main way that alphanumeric scales work. Every letter has a grade value. Those values are averaged together then the cut-off is used to determine the final grade. For example: A = 100, B= 80. Student has A, A, B (value = 100, 100, 80). Average =

	92.5%. The cut-off for A is 90, so the final grade is A. There are two scenarios where a numeric scale uses a value and cut-off.
Basic Numbers	This is the main way that numeric scales work. Basic numbers have no special values. For example: 4, 4, 3, 3 = 4, 4, 3, 3. Average = 3.5. There are two scenarios where a numeric scale does not use basic numbers. In order to calculate the grade correctly, you create Translation Values.

Standards Scenarios

The grade scales calculation in PowerTeacher Pro is dependent on the preferences the teacher has set on the Standards Grades Calculations page in PowerTeacher Pro.

If no calculation preferences are set:

Standards Scenario	Alphanumeric Scale	Numeric Scale
Using assignment standard scores to calculate the final standards grade.	Uses values and cut-offs to calculate the final standards grade. Every letter has a grade value. The grade values are added, then the cut-off is used to determine the final grade.	Uses basic numbers with no special values.

If preference is set to calculate the higher level standards grades from lower level standards grades:

Standards Scenario	Alphanumeric Scale	Numeric Scale
Rolling up standards final grades to the higher level standards, when all lower level standards have the same scale.	Uses values and cut-offs to calculate the final standards grade. Every letter has a grade value. The grade values are added, then the	Uses basic numbers with no special values.

	cut-off is used to determine the final grade.	
Rolling up standards final grades to the higher level standards, when some of lower level standards have different types of grade scales.	Uses values and cut-offs to calculate the final standards grade. Every letter has a grade value. The grade values are added, then the cut-off is used to determine the final grade.	Uses the grade value and cut-off to use the values and cut-offs grading method.

If preference is set to allow assignment scores to auto-calculate the assignment standards scores:

Standards Scenario	**Alphanumeric Scale**	**Numeric Scale**
Pushing scores from the assignment to the standards scores.	Uses values and cut-offs to calculate the assignment standard scores. Every letter has a grade value. The cut-off is used to determine the assignment standards score.	If the same scale is used for the section's traditional grade as well as the standards being assessed, then basic numbers with no special values are used. If however the scales differ, then the translation values and cutoffs are used.

Standards Calculation Measures

Here are five example scores, an explanation of each calculation option, and a discussion of when each option might be a good or a bad choice for your class.

Example Score	**Calculation Method**	**Calculation Score Result**
Scores on five assignments: 2, 3, 3, 3, 4	Mean (average of the scores)	3

	Weighted Mean (average of the scores, weighted by points possible)	3 (but depends on the weighted points possible for the assignments)
	Median (middle score)	3
	Mode (most frequently occurring score)	3 **Note:** When there is more than one mode, this score will be blank.
	Highest (highest score)	4
	Most Recent (average of the most recent scores)	Most Recent 1 score: 4 Most Recent 2 scores: 3.5 (average of 3 and 4) Most Recent 3 scores: 3.33 (average of 3, 3, and 4) You can also set a weight for each of the most recent scores on the Preferences dialog. For example, set the most recent calculation to use the last 3 scores. You want the most recent to be 50%, and the 2 before to each be 25% of the calculation. You can also set a weight for each of the most recent scores on the Preferences dialog. For example, set the most recent calculation to use the last 3 scores. You want the most recent to be 50%, and the 2 before to each be 25% of the calculation.

Every measure has times when it is valuable, and times where it may not be the best measure for your class.

Calculation Method Description

The following table lists the calculation methods available.

Calculation Method	When to Use It	When Not to Use It
Mean	When you have equally important scores at each period of time, and the learning is not cumulative. For example, in History, final unit test scores on unit 1, unit 2, and unit 3 may all be independent. In that case, using the mean (or average) could be a good choice.	When students are introduced to a new concept and the learning is cumulative over time. For example, students start out not understanding a concept, but over the term they get it. Averaging their initial scores (where they were unfamiliar with the work) with their final attempts (when they understood the concepts) may not be the best measure. For example, consider the following scores: 20%, 30%, 40%, 95%, 100%. In this case, the student likely did not understand the concept at the beginning, but by the end they got it. The average here is 57%, which may not be the most reflective of their proficiency at the end of the term.
Weighted Mean	The weighted mean is better than the mean when assignments with high weighted points possible	When all standards scores are valid indicators of performance, the teacher may not care about the

	should be counted more heavily.	specific points possible. This is especially true if there are high point value assignments from early in the semester, and the students have grown tremendously since that time.
Median	When you have multiple data points, and students have been given lots of chances to demonstrate mastery. It allows the student to overcome their initial attempts when they don't understand at the beginning, because only the middle score is used. Some people consider this one of the most consistent measures of performance. This measure throws out high and low outlying scores. For this reason, housing price data is usually listed in terms of the median sales price. There are extremes at either end that can skew average.	When there are only a few data points. In that case, the middle number can simply be luck. Or, when the learning is cumulative, where the students know much more at the end of the term, and their proficiency is significantly better across the board than at the start. For example, consider the following scores: 20%, 30%, 40%, 95%, 100%. In this case, the student likely did not understand the concept at the beginning, but by the end they got it. The median (or middle number) here is 40% and may not be the most reflective of their proficiency at the end of the term.
Mode	When you have a small range of possibilities. For example, when using letter grades A,B,C,D,F, or a 1-4 scale, there are only a limited range of score options. If a student's	When there are multiple possible scores, and it is unlikely for the exact score to be consistent. For example, this is not a good measure for percentage scores. Example percentage

	scores are A, D, A, B, A, the most frequently occurring value is A.	scores: 90, 91, 25, 100, 99, 81.5, 98, 97, 25, 96, 94. In this data, the mode is 25%. The average is 81.5%. The median is 94%.
Highest	When the student's highest level of demonstrated proficiency is a good indicator of what they know and can do. When assessments are in-depth and highly reliable. In these cases, many districts believe that the student's highest score is a good indicator.	When the highest score could be based on chance or lucky guessing. For example, on multiple choice tests, the student could have guessed right on several questions by chance, boosting their highest score. For example, one student's results for one standard assessed on 5 multiple choice tests were as follows: 70, 95, 70, 70, 70. Although the student did get a 95 once, this score may not be the best reflection of the student's actual level of proficiency on this standard.
Most Recent	When the learning is cumulative, and the students will demonstrate a much higher level of proficiency at the end of the term than at the beginning. In these cases, it makes sense to focus on the most recent scores as a reflection of the student's proficiency.	When some of most recent scores themselves are anomalies. For example, if a student recently was very ill, or experienced some other phenomenon, then the most recent scores may not be reflective of their actual proficiency. This is usually assessed student by student to determine if the most recent scores are accurate. It can also happen when the most recent

		assessment is not as detailed or reliable as earlier assessments, or there were other distracting factors. For example, students have lots of good quizzes and a unit test with reliable data. That was followed by in-class review worksheets. Half of the students were distracted completing them because there was construction going on outside. In this case, the most recent data may not be the most reflective.
Specific Weight	Values entered in the weight field for standards related to the course are used to determine which standards grades will be averaged to produce the course grade as well as how much each standard grade will be weighted in that calculation.	If you want to weigh all of the standards assessed by the student to determine a final grade. For calculating a final standards grade, you want all direct child standards to calculate to the parent. For calculating a final traditional grade from standards, you want all standards assessed for the student to be included in the calculation.
Specific Sum	For use with numeric grade scales. Values entered in the weight field for standards related to the course are used to determine which numeric standard grades will be summed to produce a	You do not want to have a separate scale where specific summed standards grades are evaluated against a larger maximum range.

	numeric course grade, as well as how many times they will be counted. For example: The course standard has a weight of 2, numeric value of the standard grade is 3, sum value for that standard grade is 6. Course or section grades scales will often allow higher numeric values than those assigned to the standards being summed to allow for more meaningful summed totals. For example: A standard has a numeric 1-4 grade scale. The related course where the grade is being summed might have a 1-20 numeric grade scale so that up to 5 standard grades can be summed into the course grade for a maximum course grade of 20.	

Important Usage Note: In PowerTeacher Pro, you can mark any score as Exempt. If a student was sick during the last quiz, you can exempt this score. The most recent calculation will then ignore that score, and use the previous score. In this manner, you can use the most recent scores, while still exempting any scores that are not good reflections of the student's learning.

How Do I Determine the Standards Final Grade for the Marking Period?

The default calculation method is used as a starting point. However, as described above, sometimes these measures work very well, and other times there are reasons to prefer a different calculation. The default calculation is a good starting point. However, the teacher should review the standards scores above, and review the calculations in the summary area below. Then the teacher can determine if the calculated score is correct for the report card for this student, or if they want to choose a different grade on that standard for that student.

Here are two examples, both of which start with the default calculation of the highest score for the final standards grade.

Student 1

- Scores: 3,3,3,4,4,4,4,4,4,4
- Highest = 4
- Final Grade Decision on this standard: For this student, 4 is probably a good choice for the final grade on this standard. No change or further work needed.

Student 2

- Scores: 2,2,4,2,1,2,2,2,2,2,2,2,2
- Highest = 4

Final Grade Decision on this standard: For this student, it would be good to know more about the time they got a 4. Likely, the teacher will want to change the standard final score on the report card from 4 to 2. Two is the median, mode, approximate average, and the most recent score. With this data, 2 appears to be a more accurate representation of the student's actual proficiency level on this standard than 4.

Standard Conversion Scales

Create conversion scales to be used with PowerTeacher Gradebook that can be assigned to standards to determine the standards final grades and standards assignment scores. PowerTeacher Pro does not use conversion scales. However, if a teacher is switching from PowerTeacher Gradebook to PowerTeacher Pro in the middle of the term length of a class, then it is imperative that the standards assigned to the course have a conversion scale and a grade scale that match, and that are tied directly to those standards. This will ensure that the data migration works correctly.

How to Create a Conversion Scale

Before entering standards, you must first create at least one conversion scale.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Conversion Scales**. The Standard Conversion Scales page appears with the default scale already created. However, you must define each scale and enter the cutoffs for each level and for the converted score.

Note: It is advantageous to leave a default scale in your system for importing purposes.

4. Click **New**. The New Standard Conversion Scale page appears.
5. Use the following table to select the grade scale type:

Type	Description
Name	Enter a name for the standard conversion scale.
Type	Choose a grade scale type from the pop-up menu: • **Alphanumeric:** Use for letter grades such as A, B, and C or E, S, and N, or descriptive grades such as Excellent, Satisfactory, and Unsatisfactory. • **Numeric (2 decimal places):** Use for GPA-type grades such as 4.00, 3.00, and 2.00. • **Numeric (zero decimal places):** Use for simple numerical grades such as 1, 2, 3, and 4. • **Numeric (custom)**: Use for custom numeric grades such as a 4,3,2,1 scale where teachers are allowed to enter decimal scores like 3.5.
Min	Enter the minimum numeric value allowed. Based on the Min and Max numbers you enter, PowerSchool will automatically populate the range of numeric values along with the applicable cut-off and grade values. **Note**: This field appears when **Numeric** is selected on the Type pop-up menu.
Max	Enter the maximum numeric value allowed. Based on the Min and Max numbers you enter, PowerSchool will automatically populate the range of numeric values along with the applicable cut-off and grade values. **Note**: This field appears when **Numeric** is selected on the Type pop-up menu.

Decimal Places	Enter the number of decimal places allowed. **Note**: This field is editable when **Numeric (custom)** is selected on the Type pop-up menu.
Description	Enter a description.

6. Click **Submit**. The Standard Conversion Scales page appears.

   Note: Enter as many conversion scales as needed for the district.

How to Add or Edit Conversion Scale Attributes

After defining the conversion scale, you can edit the scale attributes.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Conversion Scales**. The Standard Conversion Scales page appears.
4. Click on the Edit Scale link of the scale you want to modify. The Edit Scale page appears.
5. To add an attribute to this scale, click **New**. To edit an existing attribute, click the Number/Level or Grade/Label hyperlink.
6. Use the following table to enter information in the fields:

Type	Description
Name	The name of the conversion scale appears
Type	Displays a description of the standard conversion scale entry.
Number/Level or Grade/Label	In a numeric scale, displays the number/level as a hyperlink. In an alphanumeric scale, displays the grade/label as a hyperlink.
Description	Displays the description for the number or grade.

Cut-off	Displays the cut-off percentage. This is the minimum a student must earn on an assignment to receive this grade. In a numeric scale, this value is used as a translation value when other values are translated into this scale.
Grade Value	Enter the percentage used for calculations when this grade is entered as an assignment score. In a numeric scale, this value is used as the percentage when calculating the number/level as an assignment score.

7. Click **Submit**. The Edit Scale page appears.

   Note: Enter as many conversion scale attributes as needed for the conversion scale.

Custom List

The Custom List displays standards in a hierarchical list.

How to Set Up the Custom List

After defining the conversion scale, you can edit the scale attributes.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Custom List Settings**. The Custom Standards List Settings page appears.

   Note: Use the list settings to search for a particular standard by multiple criteria. However, after you submit the search, enter new standards using the criteria defined by your search.

4. Use the following table to select a search comparator:

Comparator	Description
(Blank)	Ignore this field.

=	Must be an exact match.
#	Must not be an exact match.
$	Contains.
!$	Does not contain.

5. Use the following table to search for a standard:

Field	**Description**
Identifier	Enter the code used by administrators for reporting and by teachers for designating to assignments. Must be unique.
Name	Enter the name of the standard.
Level	Select the level identifier from the pop-up menu.
Active Status	Select the standard's active status from the pop-up menu.
Course Numbers	Enter course numbers separated by commas.
Subject Area	Enter the global naming convention for the subject area for the standard.
Description	Enter a description of the standard.
Conversion Scale	Select a previously defined conversion scale from the pop-up menu.
Grade Scale	Select a grade scale from the pop-up menu.
Teachers Score this Assignment	Do one of the following:

	• Select **Yes** to include standards that you have marked for teachers to score. • Select **No** to exclude those standards.
Exclude From Reports	Do one of the following: • Select **Yes** to include those standards in the custom list that you have marked for exclusion from reports. • Select **No** to exclude those standards in the custom list that you have marked for exclusion from reports.
Sort Order	Select the sort order from the pop-up menus. This defines how the search results appear on the page.
Columns to Show	Select one or many check boxes to define what the search results display.

6. Click **Submit**. The Custom Standards List page appears.

   After searching for the specific criteria, the results of your search appear; however, the results can be blank.

How to View the Custom List of Standards

After you have defined your custom list settings, you can use this page to view your custom list, create new standards, and edit existing standards.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Custom List**. The Custom Standards List page appears.
4. Click **New** to create a new standard. For more information, see *How to Manually Enter Standards*.
5. To view and edit standards, click on the name of the standard. For more information, see *How to View and Edit Standards*.
6. To search for standards:

   a. In the **Search** field, enter a standard name or identifier, and then click **Apply**. Standards matching the search criteria appear on the page.
   b. Click **Clear** to remove the search entry.
   c. Click the triangle next to **Filter** to collapse the search field.
7. To filter the custom list of standards by school year, click **Term** in the navigation menu, and make a selection from the pop-up menu. The page refreshes with the standards assigned to the selected school year.

Standards Data Access Tag (DAT) Formatting

Set up the formatting for the following Standards DAT used in PowerSchool:

- std.stored.avg
- std.stored.high

For more information on standards DAT, see the *PowerSchool Data Access Tags Supplement* guide, available on PowerSource.

How to Set Up Standards DAT Format

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Standards Data Access Tag (DAT) Formatting**. The Standards Data Access Tag (DAT) Formatting page appears.
4. In the **Number of decimal places in percent scores** field, enter the number of decimal places to be used when percent scores are present (for example, 3).
5. Select the **Include "%" character in percent scores** checkbox to include the percent character when percent scores are present (for example, 89%). Otherwise, leave the checkbox blank.
6. Click **Submit**.

Manage Next Year

Use this optional feature to create the list of standards for the next school year during the current year if you have finalized the standards names and hierarchy. After completion, change the names and hierarchy of standards for the next school year as needed without affecting standards for the current school year. Note that if this process is used, subsequent changes to the current year standards will not be migrated to the next year standards list as part of the end-of-year process.

If you do not use this feature, standards will be automatically created for the next school year as part of the end-of-year process based on the names and hierarchy in place when the end-of-year process is engaged.

How to Create Next Year's List of Standards Prior to End-of-Year

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Manage Next Year**. The Manage Next Year page appears.
4. Click **Create Standards List**. A confirmation message appears at the top of the page.

   Note: The next school year must already be created at the District Office in PowerSchool in order to use this feature.

5. Navigate to the List Standards page (**Start Page > District > Standards**) and change the **Term** to next year to work with the standards you just created.

   Note: You can also create the calculation formulas for the next school year prior to the end-of-year process. For more information, see *Grade Calculations*.

Tests Setup

Before entering test scores for an individual student, create new tests that are available to all the schools on your system. If the test already exists on your system, you can edit test information, such as its description or the sort order of test scores.

How to Create a New a Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **New**. The New Test page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the test.

Type	Choose the level of the test from the pop-up menu.
Description	Enter a description for the test that appears on the Test Scores and student pages menus.

5. Click **Submit**. The Test Scores page displays the new test. To add test scores, see *How to Create a Test a Score*.

How to Edit a Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click the name of the test you want to edit. The Edit Test page appears.
4. Edit the information as needed. For field descriptions, see *How to Create a New a Test*.
5. Click **Submit**. The Test Scores page displays the edited test. To add test scores, see *How to Create a Test Score*.

How to Delete a Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click the name of the test you want to delete. The Edit Test page appears.
4. Select the checkbox at the end of the warning note.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Test Scores Setup

Test scores are scores associated with a particular test. Use the test score fields when entering scores for individual students. Before creating test scores, identify or create the appropriate test. For more information, see *Tests Setup*.

How to Create a Test Score

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.

3. Click **Edit Scores** next to the test you want to edit. The Test Scores: [Test Name] page appears.
4. Click **New**. The New Test Score: [Test Name] page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the test score
Sort Order	Indicate the order for the test score. **Note:** Alternatively, leave the Sort Order field blank and set the sort order from the Test Scores: [Test Name] page. For more information, see *How to Edit a Test*.
Description	Enter a description for the test to appear on the Test Scores page.

6. Click **Submit**. The Test Scores: [Test Name] page displays the new test score.

How to Edit Test Scores

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **Edit Scores** next to the test you want to edit. The Test Scores: [Test Name] page appears.
4. Skip to Step 6 to edit a test score. To change the sort order of the test scores, enter the order of each test scores in the Sort Order fields.
5. Click **Submit**.
6. Click the score name for the test score you want to edit. The Edit Test Score: [Test Name] page appears.
7. Edit the information as needed. For field descriptions, see *How to Create a Test Score*.
8. Click **Submit**. The Test Scores: [Test Name] page displays the edited test score.

How to Delete a Test Score

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **Edit Scores** next to the test. The Test Scores: [Test Name] page appears.

4. Click the score name for the test score you want to delete.
5. Select the checkbox at the end of the warning note.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

School Setup

Class Rank

Use class rank to determine the order of students when sorted by grade point average (GPA). For example, the student with the highest GPA ranks at the top of the class. Since class rank calculates based on GPAs, the appropriate GPA calculation methods must exist before determining class rank.

Create a class rank method to set parameters for calculating the class rank. Use multiple class rank methods with varying settings to determine multiple sets of class rankings. For example, you can rank all current students using one method and then rank all current students plus students who graduated early using another method.

Class rank is calculated either manually or automatically at specified intervals, such as every week or only after grades are stored. Since calculating class rank affects all class rank methods, it is best to avoid creating more class rank methods than necessary.

Note: Though you can edit class rank methods, you cannot delete class rank methods via the Class Rank Settings page. Instead, you must use Direct Database Access to remove the class rank method. For more information, see *Direct Database Export*.

View the results of the class rank calculation using the Class Ranking Report. For more information, see *How to Run the Class Ranking Report*. You can also include class rank data access tags on custom reports and exports. For more information about data codes, see *PowerSchool Data Codes*.

How to Add a Class Rank Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Class Rank Methods**. The Class Rank Methods page appears.
4. Click **New**. The Class Rank Method page appears.
5. Use the following table to enter information in the fields:

Field	Description
Description	Enter a description of the class rank method, such as **Class Rank - Simple GPA**.

GPA Calculation Method	Select from the pop-up menu which GPA calculation method to use when calculating class rank. The GPA calculation method determines what is queried and how grades are calculated.
GPA result is	Select from the pop-up menu how you want to assess the class rank: • **Numeric** - Assesses rank numerically, such as giving the student with the highest GPA the rank of 1. This is the most commonly-used selection. • **Text** - Assesses rank alphabetically, such as giving the student with a GPA of A the rank of 1. Select this option when the GPA method returns a text value. For more information, see *GPA Calculation Methods*.
Only include grades	Select the checkbox to include only grades for courses or sections that count in class rank. **Note:** When selected, the class rank grade results may differ from GPA calculation results. This is the only class rank method setting that returns a result that may differ from the GPA.
Exclude students	Select the checkbox to exclude students that are set as excluded from class rank on the students' Other Information page. Some students may be excluded from class rank because they are enrolled for a short amount of time and should not be ranked amongst longer-term students. For more information about excluding a student from the class rank, see *Other Information*. Deselect the checkbox to override the student exclusion setting.
Include early graduates?	Select the checkbox to include students that graduate early. This checkbox filters students that have already exited the school using an exit code that identifies an early graduation. If selected, you must specify in the next field the early graduation exit code.
Early graduation exit code	If the checkbox in the previous field is selected, enter an exit code that specifies an early graduation.

6. Click **Submit**. The Class Rank Methods page displays the new class rank method.

How to Edit a Class Rank Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Class Rank Methods**. The Class Rank Methods page appears.
4. Click the name of the class rank method you want to edit. The Class Rank Method page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Class Rank Method*.
6. Click **Submit**. The Class Rank Methods page displays the edited class rank method.

How to Recalculate Class Rank

To refresh class rank data, recalculate all class rank methods either manually or at specified intervals.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Recalculation Frequency**. The Class Rank Recalculation Frequency page appears.
4. Select at which frequency the class rank should recalculate:
    - **Daily** - Recalculates automatically during the nightly process
    - **Weekly** - Recalculates automatically each weekend
    - **Monthly** - Recalculates automatically once per month
    - **After storing grades** - Recalculates automatically each time grades are stored
    - **Manually** - Never recalculates automatically

      Note: To manually recalculate the class rank, click **Recalculate now**. The class rank recalculates immediately. Once complete, the Changes Recorded page appears.

5. Click **Submit**. The GPA Options Changed page appears.

Current Grade Display

Use Current Grade Display to set how PowerSchool displays a student's grade and attendance information in the following areas of PowerSchool:

- Quick Lookup page in PowerSchool
- Grades and Attendance page in the PowerSchool Student and Parent portal
- PowerSchool Mobile

Update the settings on this page at the end of each grading term to be sure administrators, administrative staff, and parents view the most up-to-date information for students.

How to Add or Edit Current Grade Display

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Current Grade Display**. The Current Grade Display page appears.
3. In the **Current Grade** field, enter the store code for the current grading term. PowerSchool uses this value to determine which grade to display in all current grade fields, GPA calculations on the Quick Lookup page, and Data Access Tag (DAT) calculations.
4. Click **Submit**.

PowerTeacher Final Grade Entry

In some cases, your district may only want teachers to enter final grades and not use a gradebook. These teachers can only enter final grades in PowerTeacher. Before teachers can use PowerTeacher to enter final grades, you need to set up your PowerSchool system to do so.

Note: These setup procedures are only applicable if you are using PowerTeacher. They are **NOT** applicable if you are using PowerTeacher Gradebook. For information about setting up final grades for PowerTeacher Gradebook, see *PowerTeacher Gradebook Final Grades Setup*.

PowerTeacher Gradebook Final Grade Entry

Teachers using PowerTeacher Gradebook should **NOT** use PowerTeacher to enter final grades. For teachers who only do final standards grade entry, PowerTeacher Gradebook has been designed to be much faster and fixes all of the previous issues with PowerTeacher final grade entry. No information entered in PowerTeacher will appear in PowerTeacher Gradebook. It is advised that all teachers move to PowerTeacher Gradebook for standards grades entry. No setup in the Final Grade Entry Options within the School Setup section of PowerSchool is required for teachers using PowerTeacher Gradebook.

How to Set Up PowerTeacher for Final Grade Entry

In PowerSchool, when you enter standards to be used for final grade entry or for use with PowerTeacher Gradebook, you must remember to do the following for each standard in the district office standards setup:

- Enter a course number or course numbers. Only those standards that list a course number matching the course number of the teacher's current class appear for final grade entry.
- Select the **Allow assignments to be tied to this standard** checkbox for the appropriate standards in PowerSchool. Teachers may only record final grades for those standards that have the checkbox selected.

For detailed information, see *Enter Standards*.

How to Set Up Final Grade Entry - Global Options

Use this page to set up global final grade entry options.

Note: These settings apply to the selected school only. This feature is for PowerTeacher portal final grade entry only. Changes made in PowerTeacher portal will not be reflected in PowerTeacher Gradebook and changes made in PowerTeacher Gradebook will overwrite data entered in PowerTeacher portal.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade Entry Options**. The Teacher Final Grade Entry Options page appears.
3. Click **Global Settings**. The Final Grade Entry - Global Options page appears.
4. Use the following table to enter information in the fields:

Field	Description
Enable Final Grade Entry in PowerTeacher Portal	Select the checkbox to allow teachers to enter final grades in PowerTeacher.

Final Grade Columns to Display	Enter the final grade columns you want to appear in PowerTeacher.
Allow Entry for These Final Grades	Enter the grading terms for which teachers can enter final grades in PowerTeacher.
Allow Entry for	Do one of the following: • Leave both blank to indicate there is no date restriction. • Enter the number of days before the end of the term and the number of days after the end of the term that teachers can enter final grades in PowerTeacher.

5. Click **Submit**. The Teacher Final Grade Entry Options page appears.

How to Set Up Traditional Final Grade Entry Options

Use this page to set up traditional grading entry options.

Note: These settings apply to the selected school only. This feature is for PowerTeacher portal final grade entry only. Changes made in PowerTeacher portal will not be reflected in PowerTeacher Gradebook and changes made in PowerTeacher Gradebook will overwrite data entered in PowerTeacher portal.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade Entry Options**. The Teacher Final Grade Entry Options page appears.
3. Click **Traditional Grading**. The Final Grade Entry Options page appears.
4. Use the following table to enter information in the fields:

Field	Description
Enable Final Grade (Letter) Entry	Use the pop-up menu to indicate whether or not teachers can enter Final Grade (Letter): • Choose **Disabled** from the pop-up menu if you do not want to allow teachers to enter Final Grade (Letter).

	• Choose **Pop-up** from the pop-up menu to allow teachers to enter Final Grade (Letter) via a pop-up menu. Section's Grade Scale settings provide the pop-up menu selections. • Choose **Text Field** from the pop-up menu to allow teachers to enter Final Grade (Letter) via a text field. **Note:** To allow teachers to enter final grade comments, do not disable this field.
Enable Final Grade (Citizenship) Entry	Use the pop-up menu to indicate whether or not teachers can enter Final Grade (Citizenship): • Choose **Disabled** from the pop-up menu if you do not want to allow teachers to enter Final Grade (Citizenship). • Choose **Pop-up** from the pop-up menu to allow teachers to enter Final Grade (Citizenship) via a pop-up menu. District-level Citizenship Codes provide the pop-up menu selections. • Choose **Text Field** from the pop-up menu to allow teachers to enter Final Grade (Citizenship) via a text field.
Enable Final Grade (Percentage) Entry	Indicate whether or not teachers can enter Final Grade (Percentage): • Leave the checkbox blank if you do not want to allow teachers to enter Final Grade (Percentage). • Select the checkbox blank to allow teachers to enter Final Grade (Percentage).
Enable Final Grade (Points) Entry	Indicate whether or not teachers can enter Final Grade (Points): • Leave the checkbox blank if you do not want to allow teachers to enter Final Grade (Points). • Select the checkbox blank to allow teachers to enter Final Grade (Points).

Enable Final Grade (Total Points) Entry	Indicate whether or not teachers can enter Final Grade (Total Points): • Leave the checkbox blank if you do not want to allow teachers to enter Final Grade (Total Points). • Select the checkbox blank to allow teachers to enter Final Grade (Total Points).

5. Click **Submit**. The Teacher Final Grade Entry Options page appears.

How to Set Up Standards-based Final Grade Entry Options

Use this page to set up standards-based entry options.

Note: These settings apply to the selected school only. This feature is for PowerTeacher portal final grade entry only. Changes made in PowerTeacher portal will not be reflected in PowerTeacher Gradebook and changes made in PowerTeacher Gradebook will overwrite data entered in PowerTeacher portal.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade Entry Options**. The Teacher Final Grade Entry Options page appears.
3. Click **Standards-based Grading**. The Standards-based Final Grade Entry Options page appears.
4. Use the following table to enter information in the fields:

Field	Description
Enable Standards Final Grade Entry in PowerTeacher Portal	Select the checkbox to allow standards final grade entry in PowerTeacher.

5. Click **Submit**. The Teacher Final Grade Entry Options page appears.
6. Make sure that the settings you enter look correct for the teachers by signing in as a teacher.

After you define the course number and select the checkbox for each standard, and after you define final grade entry settings in PowerSchool, teachers of the indicated courses can use PowerTeacher to enter final standards grades.

How to Enter Standards Final Grades in PowerTeacher

To enable standards final grades entry, the **Enable teacher entry screens** checkbox on the Final Grade Entry - Global Options page must be selected AND the **Enable standards final grade entry in PowerTeacher Portal?** checkbox on the Standards-based Final Grade Entry Options page must be selected. Once enabled, teachers can enter standards final grades in PowerTeacher.

Note: Standards information entered in PowerTeacher do not display in the PowerSchool Student and Parent portal. Only standards information entered in PowerTeacher Gradebook appear in the PowerSchool Student and Parent portal.

1. Open your Web browser to your school's PowerTeacher URL. The Teacher Sign In page appears.
2. Use the following table to enter information in the fields:

Field	Description
Username	Enter your username.
Password	Enter your password. The characters appear as asterisks (*) to ensure greater security when you sign in.
Select Language	Choose the language in which you want to view PowerTeacher from the pop-up menu.

3. Click **Sign In**. The start page appears.
4. Click the **Backpack** icon next to the class whose standards final grades you want to view or enter. The class roster appears.
5. Click a student's name.
6. Choose **Final Grade Entry (Standards)** from the **Select screens** pop-up menu. The Final Grade Entry page for standards appears.
7. Enter the appropriate grades for each standard for the student.

Note: To view a detailed list of the standards codes and descriptions, choose Standards from the **Select screens** pop-up menu and click on the appropriate course section.

8. To enter a final grade comment regarding the student's achievement or behavior, enter text in the appropriate **Comment** field.
9. Click **Submit** to store the final grades.
10. Repeat the process for each student in the class by clicking the student's first name.

How to Enter Traditional Final Grades in PowerTeacher

To enable traditional final grades entry, the **Enable teacher entry screens** checkbox on the Final Grade Entry - Global Options page must be selected AND at least one traditional final grade setting must be enabled on the Teacher Final Grade Entry Options page. Once enabled, teachers can enter traditional final grades in PowerTeacher.

1. Open your Web browser to your school's PowerTeacher URL. The Teacher Sign In page appears.
2. Use the following table to enter information in the fields:

Field	Description
Username	Enter your username.
Password	Enter your password. The characters appear as asterisks (*) to ensure greater security when you sign in.
Select Language	Choose the language in which you want to view PowerTeacher from the pop-up menu.

3. Click **Sign In**. The start page appears.
4. Click the **Backpack** icon next to the class whose traditional final grades you want to view/enter. The class roster appears.
5. Click a student's name.
6. Choose **Final Grade Entry (Traditional)** from the **Select screens** pop-up menu. The Final Grade Entry page for traditional grading appears.
7. Enter or choose from the pop-up menus the appropriate grade, percent, or points for each final grade for the student.

8. To enter a final grade comment regarding the student's achievement or behavior, enter text in the appropriate **Comment** field.

   Note: Standards final grades entries may appear on the same page as traditional final grade entry based on the Final Grade Entry Global Options set by the system administrator. If combined, the Comment Bank does not appear.

9. Click **Submit** to store the final grades and any comments you entered.
10. Repeat the process for each student in the class by clicking the student's first name.

PowerTeacher Gradebook Final Grades Setup

Use Final Grades Setup to view and set up your school's grading terms and their parameters. Define the dates of each grading term in the school year and assignment names for which teachers enter final grades for that term.

When you store final grades at the end of each term, you store a specific final grade, such as Q1. Before you can store final grades, you must set up final grades in PowerSchool. Ensure that the following steps have been completed so that teachers can use the gradebook to report their students' grades to PowerSchool.

Note: You must set up final grades for each school that shares your PowerSchool server.

Set up final grades one term at a time. When you set up final grades for a term, you affect only the courses that belong to that term. For example, a first semester course belongs only to Semester 1; it does not belong to Quarter 1, Quarter 2, or the entire school year.

After you set up final grades in PowerSchool, the information is automatically sent to each teacher's gradebook.

Note: If you do not define the final grade setup for a grading term, teachers will not be able to enter grades in the gradebook.

For information about setting up final grades entry in PowerTeacher, see *PowerTeacher Final Grade Entry*. The page displays any grading terms already defined for the current school year.

How to Add Final Grades

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Click **New** under the term for which you want to set up final grades. The New Final Grade page appears.

4. Use the following table to enter information in the fields:

Field	Description
School	The selected school name appears.
Name	Enter a name for this final grade, such as **Q3**.
Staring Date	Enter the starting date to indicate the date the term begins using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Ending Date	Enter the ending date to indicate the date the term ends using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Suppress Letter Grade Display	Select the checkbox if you do not want to display letter grades in the system and on reports. Only percentage grades appear.
Suppress Percent Display	Select the checkbox if you do not want to display percent grades in the system on reports. Only letter grades appear.
At or Above This Level of Attendance Points	Enter a level of attendance points for the given date range to automatically affect students' grades due to attendance. Otherwise, enter **0** or leave the field blank.
Change a Student's Grade to	Enter the grade that students receive after meeting or exceeding the attendance points indicated in the previous field.
Do not apply the attendance point change to the following grades	**Note**: These fields only appear when editing an existing final grade. To make exclusions to the attendance point change: 1. Click **Add a Gradescale**. The Final Grade Exclusion page appears.

	2. Choose a grade scale from the Grade Scale pop-up menu. 3. Click **Submit**. The Edit Final Grade page appears. 4. Click **No Marks Excluded**. The Final Grade Exclusions page appears. 5. Select the **Marks to Exclude** checkboxes that apply. 6. Click **Submit** to save the changes or click **Delete** to remove.

5. Click **Submit**. The Final Grades Setups page displays the new final grade.

How to Edit Final Grades

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Click the term name that you want to edit. The Edit Final Grade page appears.
4. Edit the information as needed. For field descriptions, see *How to Edit Final Grades*.
5. Click **Submit**. The Final Grades Setups page displays the new final grade.

How to Set Options for Presuming Complete

The Options for Presuming Complete field applies to course prerequisite rules and graduation plan progress. Entering value indicates the number of days after the end of enrollment that you want the course prerequisite rule evaluator to presume completion and graduation plans to include the enrollment as in progress. This number allows the administrator some number of days between the end of a term and the storage of grades for that term. A negative number allows specification of the number of days before the day the enrollment ends, for instances where the school typically records grades prior to enrollments ending (rare). For more information, see *Graduation Planner* or the *Graduation Planner User Guide* available on PowerSource.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Enter the appropriate value in the **Days Before/After Term End** field.
4. Click **Submit**. The Final Grade/Reporting Term Setup page displays the new final grade.

How to Delete Final Grades

If you delete final grades between the process of entering final grades and storing grades, you will lose final grade information.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Click the term name that you want to delete. The Edit Final Grade page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. A warning message appears indicating deleting the reporting term will also delete all final grades, comments, and standards grades related to this reporting term.
6. To delete these records, click **OK**. The Selection Deleted page appears.

GPA Student Screens

Use the GPA Student Screens function to determine what appears on GPA-related student pages, including the Quick Lookup page and the Cumulative Information page.

How to Define GPA Settings for Quick Lookup Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **GPA Student Screens.** The GPA Options - Student Screens page appears.
3. Choose the type of current GPA to display under schedule from the pop-up menu:
    - **Weighted**: If your school calculates weighted GPAs, the system also includes the number of credit hours students earn in each course in the GPA calculation.
    - **Weighted Percent**
    - **Simple**: If your school calculates simple GPAs, only the students' grades are involved in the calculation, and the credit hours of each course are not referenced.
    - **Simple Percent**
    - **Total Earned Credit**
4. Click **Submit**. The GPA Options - Student Screens page displays the changed Quick Lookup option.

How to Define GPA Settings for Cumulative Info Page

For the Cumulative Info student page, you can define the rows of information that appear for each student.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **GPA Student Screens**. The GPA Options - Student Screens page appears.
3. Enter in the first Row Title field the name of the first row to appear on the Cumulative Info page. The name should clearly indicate the information the user is viewing, such as Cumulative GPA (Weighted).
4. Use the following tables to determine the information you want to display in the Data column.

   For Cumulative GPAs:

Field Expression	Code	Notes
Cumulative GPA (weighted)	^(*gpa)	The cumulative GPA for the student.
Cumulative GPA (simple)	^(*gpa.simple)	Same as Cumulative GPA (weighted), except uses the simple calculation method rather than weighted.
Cumulative credit hours earned	^(*credit_hours)	Includes all courses from the Historical Grades page.
Class rank (based on cumulative weighted GPA)	^(*class_rank_out_of;gpa)	Use any valid GPA type as the GPA parameter, such as gpa.simple and gpa.percent.
Cumulative avg. % earned in all classes (weighted)	^(*gpa.percent)	See Cumulative Percentage GPA.
Cumulative avg. % earned in all classes (simple)	^(*gpa.percent.simple)	See Cumulative Simple Percentage GPA.

For GPAs for specific years and terms:

Field Expression	Code	Notes
GPA for Quarter 1 (weighted)	^(*gpa;Q1)	Calculates the GPA for Q1 of the current school year, such as the year in which the user is currently working. Q1's grades must have already been stored.
GPA for the student's entire junior year	^(*gpa;11)	Calculates the GPA for grade 11.
GPA for Q1 of the student's junior year	^(*gpa;11;Q1)	Calculates the GPA for Q1 of grade 11 for the current student. **Note:** The sequence of the parameters Q1 and 11 is not significant; ^(*gpa;Q1;11) returns the same number as ^(*gpa;11;Q1).
GPA for the year 2004	^(*gpa;2004)	Calculates the GPA for 2004 for the current student.
GPA for Quarter 3 (simple)	^(*gpa.simple;Q3)	Same as GPA for the year 2004 but using the simple calculation method. You can use percent instead of simple if you want the percent GPA.

For Current GPAs:

Field Expression	Code	Notes
The current GPA (simple)	^(*gpa.current)	From the grades on the Quick Lookup page, such as those current as of today. **Note:** Current grades are always calculated using the simple method.

The average % being earned in the current classes (simple)	^(*gpa.current.percent)	From the grades on the Quick Lookup page, such as those current as of today.

For Weighted GPAs by Credit Type:

Field Expression	**Code**	**Notes**
Weighted GPA by Credit Type	^(*gpa.credit_type.ENG)	Weighted GPA for grades for the current student in the current year that are of the credit type ENG. To calculate all historical grades, see the Weighted GPA by Credit Type by Grade field expression.
Weighted GPA by Credit Type by Grade	^(*gpa.credit_type.ENG;12)	Same as Weighted GPA by Credit Type, but also includes grade 12. For all historical grades, enter each grade and separate each grade with commas, such as ***gpa.credit_type.ENG;9,10,11,12**.

For Class Ranking by GPA:

Class ranking codes always begin with *classrank and may be followed by zero to three optional parameters:

- Parameter "method" - Specifies the name of the class rank method for which a rank should be returned. Class rank calculation methods are defined by the user in the Class Rankings section of School Setup.
- Parameter "result" - Specifies the type of data to return as the result. Possible values are "rank", "outof", "rankoutof", "percentile", "rankdate", "gpa", and "schoolname". If omitted, the default value is "rank".
- Parameter "percentiledigits" - If the parameter "result" is "percentile", this parameter specifies the number of decimal places to compute the percentage. If omitted, "2" is the default.

Field Expression	**Code**	**Notes**

Class rank, weighted (default)	^(*classrank) or ^(*classrank method="weighted")	Numerical class rank based on cumulative weighted GPA for the student's entire academic career for this school.
Class rank, user defined	^(*classrank method="UserDefined")	Class rank based on a user-defined GPA calculation method as specified in Class Rankings in School Setup.
Class rank, rank result	^(*classrank) or ^(*classrank result="rank")	Numerical class rank based on cumulative weighted GPA for the student's entire academic career for this school.
Class rank, outof result	^(*classrank result="outof")	Number of students ranked.
Class rank, rankoutof result	^(*classrank result="rankoutof")	Rank for the student, the text "out of", and the number of students ranked.
Class rank, percentile result	^(*classrank result="percentile")	Student rank percentile to the number of places specified by the percentiledigits parameter.
Class rank, rankdate result	^(*classrank result="rankdate")	Date the rank was last updated.
Class rank, gpa result	^(*classrank result="gpa")	Result of the GPA code used to determine the class rank.
Class rank, schoolname result	^(*classrank result="schoolname")	Name of the school where the student earned the rank.
Class rank, percentiledigits	^(*classrank result="percentile" percentiledigits="3")	When used with the percentile result, specifies the number of decimal places to compute the percentage.

5. Click **Submit**. The GPA Options - Student Screens page displays the new settings.

Variable Credit

To support alternative education programs, PowerSchool now offers variable credit. Using variable credit, teachers can now specify how much credit each student is attempting (potential credit) and how much credit each student is awarded (earned credit) regardless of the credit hours specified for the course or the grade the student earned for the class in a term.

To use this feature, variable credit must be enabled either for an individual section or for multiple sections. You have the option to permit teachers to enter variable awarded credit and variable attempted credit. By default, both variable awarded credit and variable attempted credit are disabled.

Note: Setting variable credit for an individual section can be done using the Edit Section page, as well as the Variable Credit Setup page. Setting variable credit for multiple sections can only be done using the Variable Credit Setup page. When setting up variable credit, you can disable both attempted and awarded credit, enabled both attempted and awarded credit, or only enable awarded credit.

Once enabled, respective column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. For more information, see Scoresheet in the PowerTeacher Gradebook online help.

Finally, variable credit scores entered in PowerTeacher Gradebook can then be permanently stored. For more information, see *Options for Storing Variable Credit*.

Variable Credit Setup

Using variable credit setup, you can enable or disable variable credit for multiple sections. Variable credit setup also provides the option to enable and disable variable credit for an individual section.

How to Mass Update Variable Credit

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Variable Credit Setup**. The Variable Credit Setup page appears.
3. Use the following table to enter information in the fields:

Note: Click Section List column headings to sort in ascending order. Click again to sort in descending order. Click **<<first**, **<prev**, [number], **next>**, **last>>** to view all of the Section List search results.

Field	Description
Search Filter	By default, the Section List is empty. Click the arrow, select one or more of the following checkboxes, enter the appropriate information in each field, and then click **Search**: • **Course Name** • **Course Number** • **Section Number** • **Teacher** • **Expression** • **Year** • **Term** • **Variable Awarded Credit** • **Variable Attempted Credit** • **Selected Term Context**
Change for all listed section to	Use the pop-up menus to indicate whether or not to permit teachers to enter variable credit for all sections in the Section List: • To permit teachers to enter variable awarded credit, choose **Variable Awarded Credit** from the first pop-up menu, **Yes** from the second pop-up menu, and then click **Set**. As a result, the Variable Awarded Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable awarded credit, choose **Variable Awarded Credit** from the first pop-up menu, **No** from the second pop-up menu, and then click **Set**. As a result, the Variable Awarded Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. • To permit teachers to enter variable attempted credit, choose **Variable Attempted Credit** from the first pop-up menu, **Yes** from the second pop-up menu, and then click

	Set. As a result, the Variable Attempted Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable attempted credit, choose **Variable Attempted Credit** from the first pop-up menu, **No** from the second pop-up menu, and then click **Set**. As a result, the Variable Attempted Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode.
Course Name	The name of the course.
Course Number	The number used to identify the course.
Section Number	The number used to identify the course section.
Teacher	The name of the teacher teaching the course section.
Expression	The period and day combination of the course section.
Year	The year in which the course section is being taught.
Term	The term in which the course section is being taught.
Variable Awarded Credit	Use the pop-up menu to indicate whether or not to permit teachers to enter variable awarded credit for the selected section: • To permit teachers to enter variable awarded credit, choose **Yes** from the pop-up menu. As a result, the Variable Awarded Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable awarded credit, choose **No** from the pop-up menu. As a result, the Variable

	Awarded Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode.
Variable Attempted Credit	Use the pop-up menu to indicate whether or not to permit teachers to enter variable attempted credit for the selected section: • To permit teachers to enter variable attempted credit, choose **Yes** from the pop-up menu. As a result, the Variable Attempted Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable attempted credit, choose **No** from the pop-up menu. As a result, the Variable Attempted Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode.

4. Click **Submit**. The Variable Credit Setup page appears and the message "Changes Saved" displays.

Repeated Course Grade Suppression

Using Repeated Course Grade Suppression students may repeat a course to improve a grade and have it applied to their graduation, GPA, class rank, and honor roll calculations. As part of the calculation, the maximum number of credits a student receives for taking the course can be set. Additionally, using Course Equivalencies, you can manage the relationship between a course and its equivalent. Once defined, course equivalencies are then used by the repeated course grade suppression process when calculating permanently store grades.

Example 1

Semester 1 a student receives a grade of F and in Semester 2 the student receives a grade of B. The F will be replaced by the B meaning the F will be excluded from graduation, class rank, honor roll, and GPA calculations. Additionally, the F will have a repeated course grade suppression value of ‘R’, indicating that it was replaced by a better grade.

Example 2

A course has a maximum credit hours setting of 1. A student takes the class three times in different semesters, each of which one credit was attempted. The student received the following grades in the following order: C, F, B. The C will replace the F and the B will be set as over maximum credit for the course. The F will be excluded from graduation, class rank, honor roll and GPA calculations. Additionally, the F will have a repeated course grade suppression value of ‘R’, indicating that it was replaced by a better grade. The B will be excluded from graduation and it will receive a repeated course grade suppression value of ‘M’, indicating it was suppressed because the student had already received the maximum number of credits allowed for that course.

Example 3

Semester 1 a student receives a grade of F for course number MATH101 and in Semester 2 the student receives a grade of B for course number MATH102. An equivalency is defined for MATH102 where it can replace MATH101. The B will replace the F where the F will be excluded from graduation, class rank, honor roll and GPA calculations. Additionally, the F will have a repeated course grade suppression value of “R”, indicating that it was replaced by a better grade. The MATH102 record will have its Replaced_Equivalent_Course field set to MATH101 to indicate that it is replacing a different “equivalent course”.

Setup

Before you can begin using repeated course grade suppression, you must perform the following setup items:

- *Set Up Repeated Course Grade Suppression Policies*
- *Set Max Credit Hours for a Course*
- *Set Repeated Course Grade Suppression for a Grade Scale*
- *Set Up Course Equivalencies*
- *Ensure Historical Grade Levels Set for School*
- *Enable Repeated Course Grade Suppression for Schools*

Set Up Repeated Course Grade Suppression Policies

Using the Repeated Course Grade Suppression Policies page, you can define more than one repeated course grade suppression policy.

How to View Repeated Course Grade Suppression Policies

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Repeated Course Grade Suppression**. The Repeated Course Grade Suppression page appears.
3. Click the **Policies** tab. The Repeated Course Grade Suppression Policies page displays the following information:

Field	Description
Add	Click to add a new repeated course grade suppression policy.
Policy Name	The name of the policy. Click the name of the policy you want to edit or delete.
Description	A description of the policy.

How to Add a Repeated Course Grade Suppression Policy

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Repeated Course Grade Suppression**. The Repeated Course Grade Suppression page appears.
3. Click the **Policies** tab. The Repeated Course Grade Suppression Policies page appears.
4. Click **Add**. The Add Repeated Course Grade Suppression Policy page appears.

5. Use the following table to enter information in the Details section:

Field	Description
Name	Enter the unique-name of the policy.
Description	Enter a description of the policy. **Note:** Up to 256 characters may be entered.

6. Use the following table to enter information in the Suppression Criteria section:

Field	Description
Only These Store Codes	Select the checkbox to limit which stored grades are to be evaluated by the repeated course grade suppression rules during the permanently store grades process. In the field next the checkbox, enter a comma-delimited list. Otherwise, leave the checkbox blank. **Note:** A maximum of 100 characters may be entered.
Allow Same-Term Suppression	Select the checkbox to allow stored grades with the same termID to replace each other when being evaluated by the repeated course grade suppression rules during the permanently store grades process. Otherwise, leave the checkbox blank.

7. Use the following table to enter information in the GPA Thresholds for Grade Suppression Calculations section:

   Note: Setting the **Low Threshold** or **High Threshold** value to null can provide for different types of setup configuration needs. For example, if:

   - Both thresholds populated (Low Threshold: 0, High Threshold: 1), grades can be replaced that apply to the high or low thresholds.
   - Only the high threshold is populated (Low Threshold: [null], High Threshold: 1), no grades are replaced unless that course or course equivalency is over the maximum credit.

- Only the low threshold is populated (Low Threshold: 1, High Threshold: [null]), grades are always replaceable based on the low threshold. No maximum credit is used to evaluate replacement. (Grade Suppression can still occur when the student has more than the maximum credit for that course.)
- Both thresholds are not populated (Low Threshold: [null], High Threshold: [null]), no grade replacement occurs at all. (Grade Suppression can still occur when the student has more than the maximum credit for that course.)

Field	Description
Low Threshold	Enter the lowest grade point value. If a grade has points <= to this value, the grade (typically F or lower) is deemed replaceable at any time. **Note:** Default set to **0**.
High Threshold	Enter the highest grade point value. If a grade has points above the low threshold but <= to the high threshold, then this grade is deemed replaceable only if the max credit for this course has been exceeded. For example, a D is typically not replaced unless other grades' earned credits equal the sum of the maximum credit hours setting for the course. **Note:** Default set to **1**.
Include Added Value in GPA Point Evaluation	Courses may include an added value for the grade points, such as **1** for one additional grade point. Select the checkbox to include added values in the GPA point evaluation.

8. Use the following table to enter information in the Replaced Grade Suppression Results section:

Field	Description
Exclude from Transcripts	Select the checkbox to exclude Suppression Results in transcripts. Otherwise, leave the checkbox blank.

Exclude from GPA	Select the checkbox to exclude Suppression Results in GPA calculation during the permanently store grades process. Otherwise, leave the checkbox blank.
Exclude from Class Rank	Select the checkbox to exclude Suppression Results in class rank calculation during the permanently store grades process. Otherwise, leave the checkbox blank.
Exclude from Honor Roll	Select the checkbox to exclude Suppression Results in honor roll calculation during the permanently store grades process. Otherwise, leave the checkbox blank.

9. Use the following table to enter information in the Over Maximum Credit Suppression Results section:

Field	Description
Exclude from Transcripts	Select the checkbox to exclude Maximum Credit Reached Results in transcripts. Otherwise, leave the checkbox blank.
Exclude from GPA	Select the checkbox to exclude Maximum Credit Reached Results in GPA calculation during the permanently store grades process. Otherwise, leave the checkbox blank.
Exclude from Class Rank	Select the checkbox to exclude Maximum Credit Reached Results in class rank calculation during the permanently store grades process. Otherwise, leave the checkbox blank.
Exclude from Honor Roll	Select the checkbox to exclude Maximum Credit Reached Results in honor roll calculation during the permanently store grades process. Otherwise, leave the checkbox blank.

10. Click **Submit**. The Changes Recorded page appears.

How to Edit a Repeated Course Grade Suppression Policy

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Repeated Course Grade Suppression**. The Repeated Course Grade Suppression page appears.
3. Click the **Policies** tab. The Repeated Course Grade Suppression Policies page appears.
4. Click the name of the policy you want to edit. The Edit Repeated Course Grade Suppression Policy page appears.
5. Enter information in the fields, as needed. For field descriptions, see *How to Add a Repeated Course Grade Suppression Policy*.
6. Click **Submit**. The Changes Recorded page appears.

How to Delete a Repeated Course Grade Suppression Policy

Note: A policy may only be deleted if they are associated to a grade scale.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Repeated Course Grade Suppression**. The Repeated Course Grade Suppression page appears.
3. Click the **Policies** tab. The Repeated Course Grade Suppression Policies page appears.
4. Click the name of the policy you want to delete. The Edit Repeated Course Grade Suppression Policy page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. A confirmation message appears.

Set Max Credit Hours for a Course

Using the Edit Course District Information page, you can set the maximum number of credits a student receives for taking the course in the **Max Credit Hours** field. The value must be greater than or equal to the **Credit Hours**. Once a value is entered, the value will be evaluated against the credit earned on stored grades to determine if it should be excluded from graduation progress/graduation planner based on the association to the grade policy related to the grade scale for the course or section.

Note: For more information, see *How to Edit District Course Information*.

Set Repeated Course Grade Suppression for a Grade Scale

Using the New Grade Scale or the Edit Grade Scale page, you can enable the **Repeated Course Grade Suppression** by choosing a repeated course grade suppression policy. If enabled, stored grades associated to this grade scale will be evaluated based on the selected repeated course grade suppression policy during the permanently store grades process.

Note: For more information, see *Grade Scales*.

Set Up Course Equivalencies

Using the Course Equivalencies page, you can manage the relationship between a course and its equivalent. For example, if EHS101 (course) and EHS102 (course equivalent) are stored, then EHS102 courses can replace EHS101 grades. EHS102 is "equivalent to" EHS101. Once defined, course equivalencies are then used by the repeated course grade suppression process when calculating permanently store grades.

Note: For more information, see *Edit Course Equivalencies*.

Ensure Historical Grade Levels Set for School

The Repeated Course Grade Suppression process operates on StoredGrades Records, which have a grade level associated with them. To properly ensure that the correct group of records are being evaluated, the group is constrained by the high and low **Historical Grade Levels** settings for the school in which you are running the process. It is important to have these values set so you don't replace middle school grade records with high school grade records, for example, or count middle school credit towards max credit at the high school. This could happen if a common course number that spans these schools.

If the school has a low historical grade level set to 9, then any record considered must have grade_level set to 9 or above. If the low historical grade level is not set, then no check against low grade is performed.

If the school has a high historical grade level set to 12, then any record considered must have grade_level set to 12 or below. If the high historical grade level is not set, then no check against high grade is performed.

So, if the school has no low historical grade level, but a high historical grade level of 12, then all storedgrades records of Grade_level 12 or below will be considered in the process.

How to Ensure Historical Grade Levels Set for School

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.

3. Click the name of the school in the Schools column that you want to edit. The Edit School page appears.
4. Scroll to the **Historical Grade Levels** fields.
5. Ensure the **Historical Grade Levels** settings are set.
6. Edit the information, if needed. For field descriptions, see *How to Add a School*.
7. Click **Submit**. The Schools/School Info page displays the edited school.

Enable Repeated Course Grade Suppression for Schools

Using the Repeated Course Grade Suppression School Settings page, you can "enable" Repeated Course Grade Suppression for selected school. When enabled, Repeated Course Grade Suppression fields appear on the Single Historical Grades Entry, Multiple Historical Grades Entries, Edit a Stored Grade and View Historical Grades pages.

Note: This procedure may only be performed at the district level.

How to Enable Repeated Course Grade Suppression for Schools

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Repeated Course Grade Suppression**. The Repeated Course Grade Suppression page appears.
3. Click the **Schools** tab. The Repeated Course Grade Suppression School Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Exclude suppression calculations for historical grades from schools that do not use repeated course grade suppression	Select the checkbox to exclude suppression calculations for historical grades from schools that do not use repeated course grade suppression. Otherwise, leave blank. **Note:** By default, the checkbox appears selected.
Schools Not Using Grade Suppression	To add a school from the Not Using Grade Suppression list to the Using Grade Suppression list:

	1. Click the school you want to add. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing right. To add all schools from the Not Using Grade Suppression list to the Using Grade Suppression list, click the double arrows pointing right.
Schools Using Grade Suppression	To remove a school from the Using Grade Suppression list to the Not Using Grade Suppression list: 1. Click the school you want to remove. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing left. To remove all schools from the Using Grade Suppression list to the Not Using Grade Suppression list, click the double arrows pointing left.
Reset	Click to reset the Not Using Grade Suppression list and Using Grade Suppression list back to their original state before you began moving schools from one list to another.

5. Click **Submit**. A confirmation message appears.

Run Process

Once you have set up repeated course grade suppression, you can:

- *Run Repeated Course Grade Suppression Process Using the Permanently Store Grades Page*

- *Run Repeated Course Grade Suppression Process Using the Repeated Course Grade Suppression Page*

Run Repeated Course Grade Suppression Process Using the Permanently Store Grades Page

Using the Permanently Store Grades page, you can enable the **Apply Repeated Course Grade Suppression Policy Rules** checkbox. If enabled, stored grades related to grade scales that allow repeated course grade suppression will be evaluated by the repeated course grade suppression rules during the permanently store grades process.

Note: For more information, see *Permanently Store Grades*.

Run Repeated Course Grade Suppression Process Using the Repeated Course Grade Suppression Page

Using the Repeated Course Grade Suppression page, you can manually run the Repeated Course Grade Suppression process at the school level.

How to Run Repeated Course Grade Suppression Process

Note: This procedure may only be performed at the school level.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Grades, click **Repeated Course Grade Suppression**. The Repeated Course Grade Suppression page appears.
3. Use the following table to enter information in the fields:

Field	Description
Evaluate grades for the currently selected (0) students only.	To filter historical grade records based the current student selection, select the checkbox. Otherwise, leave the checkbox blank. To remove the filter, remove the checkbox. **Note:** If there are no students selected, the checkbox appears shaded.
Term Range	To filter historical grade records based on term range, choose a term in the **From** and/or **To** pop-up menu. Otherwise, leave the

	fields blank. To remove the filter, choose blank from the pop-up menus. **Note:** When choosing a term, the current term appears selected in the pop-up menu.
Store Codes	To filter historical grade records based on store codes, enter a comma-delimited list of store codes by which you want to filter. Otherwise, leave the field blank. To remove the filter, remove the store codes from the field.
Stored Date	To filter historical grade records based on stored date, enter a date in the **From** and/or **To** fields or click the **Calendar** icon to select dates for each field. Otherwise, leave the fields blank. To remove the filter, remove the dates from the fields.
Course Numbers	To filter historical grade records based on course numbers, enter a comma-delimited list of course numbers by which you want to filter. Otherwise, leave the field blank. To remove the filter, remove the course numbers from the field.
Credit Types	To filter historical grade records based on credit types, enter a comma-delimited list of credit types by which you want to filter. Otherwise, leave the field blank. To remove the filter, remove the credit types from the field.

4. Click **Update Selection**. The Preview Historical Grade Selection Count section displays to following information:

Field	**Description**
Historical Grade Records Selected	The number of historical grade records found based on the criteria entered.
[Messaging]	One or more of the following messages may appear: • Filter settings have changed. Click Update Selection before running the Repeated Course Grade Suppression Process.

	• Running the Repeated Course Grade Suppression Process may affect other stored grades. • The current selection may result in over 24,000 changes to historical grade records. Use the filter options to select fewer records to continue. • The student selection has changed. Click Update Selection before running the Repeated Course Grade Suppression Process.

5. Click **Run Repeated Course Grade Suppression Process**. The Process Complete section displays the number of grades affected.

   Note: The **Run Repeated Course Grade Suppression Process** button does not appear if no historical grade records are selected or if the current selection may result in over 24,000 changes to historical grade records.

Repeated Course Grade Suppression Rules

PowerSchool supports the following repeated course grade suppression rules:

- When running the repeated course grade suppression process, it looks to see if the grade is related to a grade scale that has the repeated course grade suppression policy enabled. If so, then the broader StoredGrades table is searched for grades for the same student and course or course equivalency.
- Only grades that have potential or earned credit will be evaluated.
- GPA points are used to determine which grades are better than others and can therefore replace other grades.
- As grades are evaluated, they are processed in groups based on having the same StudentID and Course_Number. They are processed in the order of oldest to newest (based on yearID and ending Term Bin date). As they are processed, earned credits are tallied to help determine if when some grades can be replaced and when the student is over the maximum credit for the course.
- If store codes are specified in the policy, then only grades with those store codes will be evaluated.
- Grades with a GPA point <= than the low threshold can always be replaced by a grade with a higher GPA point value.
- Grades with a GPA point above the low threshold and <= the high threshold are only replaced by a better grade if the grades processed so far have a sum of earned credits equal to or greater than the maximum credit for the course.

- Grades cannot replace other grades with the same TermID unless specified in the policy to ignore this restriction.
- Once the sum of the earned credits is equal to or greater than the maximum credit for the course, and if that grade cannot be replaced, then that grade will be excluded from graduation and it will set the historical grade repeated course grade suppression value to M signifying it was suppressed because the student was over the maximum credits for the course. Based on the policy, these grades may also be excluded from GPA, class rank, honor roll, or transcripts.
- When a grade replaces another grade, then the replaced grade will be excluded from graduation. Based on the policy, the replaced grade may also be excluded from GPA, class rank, honor roll, or transcripts. It will also have a repeated course grade suppression value of R indicating that it was replaced by another grade. Then a correlation is made as to which grade replaced it. This is based on the hidden DCID value of the replacing grade that gets populated in the replaced grades Replacing_DCID field.
- Older grades can replace newer grades and newer grades can replace older grades.
- If the process is run multiple times and data or settings change, grades that were previously flagged as repeated or over maximum credit will have these values removed and will no longer being excluded from graduation. Additionally, the settings to be excluded from class rank, honor roll, and GPA will revert back to how the permanently store grades process sets these values without the effects of the repeated course grade suppression rules.
- The repeated course grade suppression logic will always try to replace grades that will give the student the best GPA result. However, when grades are at maximum, the latter grades are suppressed even if they are better than previous grades that have a GPA point value too high to be replaced.
- A grade cannot replace two grades. It is always a one to one relationship. However, a grade can replace another grade that has already replaced something else.

Note: For more information on the precise calculation logic, see Knowledgebase article 70584 available on PowerSource.

Working With Grades

After running the permanently store grades process, you can:

- *View Grade Suppression Code*
- *Set Grade Suppression Code for a Stored Grade*
- *Override Grade Scale Grade Suppression Policy*
- *Add a Replaced Grade to a Transcript Object Report*

View Grade Suppression Code

Using the Complete Academic Record Detail View page, you can view the Grade Suppression Code column to verify a grade in the course is for a replaced course grade.

Note: For more information, see *Historical Grades*.

Set Grade Suppression Code for a Stored Grade

Using the Edit Stored Grades page, you can set the Grade Suppression Code for a stored grade. This value is initially set during the permanently store grades process. However, it can be entered manually or adjusted after it has been calculated. If you want to prevent any future grade calculations from changing this value, choose to exclude from grade suppression calculation. When excluded, this value will be ignored during the repeated course grade suppression processing.

When editing a stored grade, use the **Grade Suppression Code** pop-up menu to select either **Replaced Grade (R)** to indicate the stored grade is for a replaced course grade or **Over Maximum Credit (M)** to indicate maximum credit hours. Making a selection does not automatically adjust whether the stored grade is excluded from excluded from transcripts or GPA, honor roll, class rank, or graduation calculations. However, these settings can be adjusted manually.

Override Grade Scale Grade Suppression Policy

Using the New Stored Grade page, the Academic Record Entry page, or the Edit Stored Grades page, you can use the **Grade Suppression Policy Override** pop-up menu to override the section or course's grade scale grade suppression policy. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process.

Note: For more information, see *How to Create a Single Historical Grades Entry*, *How to Create Multiple Historical Grades Entries*, or *How to Edit a Stored Grade*.

Add a Replaced Grade to a Transcript Object Report

Using the New Transcript Object or Edit Transcript Object page, you can include replaced grades in object reports. When adding or editing a transcript object, select **Replaced Grade** from the **Columns Field** pop-up menu and enter the grade indicator you want to print in the **Other Field/Text/Format** field. To display an indicator for grades that are replaced, enter **R**. To display an indicator for grades that are suppressed because they were over the maximum credit hours for the course, enter **M**.

Note: Use a comma to separate multiple grade indicators. Do not include blank spaces between the comma and the grade indicator.

Note: For more information, see *Transcript Objects*.

Work with Students

Cumulative Info

Cumulative Info is a view-only page that displays cumulative grades for the currently selected term. The information is derived from data access tags entered in the GPA Student Screens. For more information, see *GPA Student Screens*.

How to View Student Cumulative Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Cumulative Info** from the student pages menu. The Cumulative Information page appears.

   Note: This page is view-only for all users.

Historical Grades

Historical Grades In PowerSchool, student records include two types of grades: current and historical. Current grades are students' grades entered by each of their teachers through PowerTeacher Gradebook. Current grades change with each new assignment that teachers enter in PowerTeacher Gradebook. Teachers, administrators, and parents use current grades to track student progress throughout a grading term.

Historical grades are final grades, or grades that are permanently stored in the student's record. At the end of each grading term, your PowerSchool administrator copies and stores the students' current grades from PowerTeacher Gradebook to historical grades. Historical grades appear on report cards and transcripts.

This function displays your selected student's grades from previous terms. You have the choice of using a normal view or a detail view.

Note: The Historical Grades student page view is view-only for most users; only those with proper access, such as a school counselor, have the right to edit historical grades. Teachers who assign grades and need to change them later must contact a user with the proper access.

How to View Historical Grades

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears. For each course in which the student earned a grade, the page displays the following:
    - Year/Term - Year and store code of the term in which the student enrolled in the course.
    - Grd Lvl - Student's grade level at the time he or she enrolled in the course.
    - Course number - The number of the course.
    - Course - The name of the course.
    - Earned credit - Number of possible credit hours the student can earn in the course.
    - **[Terms]** - Historical grade the student earned in each grading term. Click a grade to access the Edit Stored Grade page.

      Note: The Normal View page displays only the grades the student received during the grade levels of the current school.

3. Click **Detail View** to view expanded information and the grades the student received at other grade levels. The Complete Academic Record Detail View page appears.

   Note: The Complete Academic Record Detail View page displays all of the student's historical grades in PowerSchool. The Detail View page is not specific to the grade levels at this school.

4. In addition to the information on the Historical Grades page, this page displays the following detailed credit information:
    - Year/Term - Year and store code of the term in which the student enrolled in the course.
    - Grd Lvl - Student's grade level at the time he or she enrolled in the course.
    - Course # - The number of the course.
    - Course Name - The name of the course.
    - Stored Code - Each grading term the student earned a historical grade.
    - **Grade** - Historical grade the student earned in each grading term. Click a grade to access the Edit Stored Grade page.
    - Earned Credit - Number of credit hours the student earned in each course.
    - Pot. Credit - Potential credit hours the student could earn in each course.
    - Earns Grad Credit - Indicates if the course is included in a graduation requirement and the credits the student earned count towards the requirement.
    - GPA - Indicates if the grade in the course is included in the student's GPA calculation.

- Class Rank - Indicates if the grade in the course is included in the class rank calculation.
- Excluded from Honor Roll - Indicates if the grade in the course is included in the honor roll calculation.
- Transcripts - Indicates if the grade in the course is included in transcripts.
- Credit Type - Indicates if the credits in the course count towards a graduation requirement based on credit type.
- Grade Suppression Code - Indicates if the grade in the course is for a replaced course grade.

  Note: Grade Suppression Code only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.

  Note: Your school can create credit types to group courses together to fill a graduation requirement. Assign credit types to courses or final grades and then specify that a requirement be filled by any courses or grades of that credit type. For example, you specify that any two courses with the ALGEBRA credit type fulfill a math requirement.

5. Click **Normal View** to return to the Historical Grade page. The Historical Grades page (Normal View) reappears.

How to Create a Single Historical Grades Entry

Enter a student's grades one at a time for incoming students. Alternatively, use the Multiple New Entries function on the Academic Record Entry page to enter a single grade. Most schools use the Academic Record Entry page to enter all grades.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Single New Entry**. The New Stored Grade page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
School Name	Enter the name of the school where the student received the grade.

School Year	Enter the year for which you want to enter a grade.
Hist. Grade Level	Enter the grade level of the student when he or she received the grade.
Store Code	Enter the store code that your school uses for the term in which the student earned the grade. Store codes are determined in the final grade setup area on the School Setup page.
Course Number - Section Number [or] Course Name	You must provide one of the following: • The course and section number of an existing section at the currently selected school. • The course name if this is historical data for which no section record exists. If you provide a course and section, this grade will be associated with the student's enrollment in that section and will print on report cards. If you supply only the course name, the grade will print on transcripts but not on report cards since it is not associated with an actual section enrollment. In either case, the grade will be included in transcripts, the Previous Grades screen, and GPA calculations.
Teacher Name	Enter the name of the teacher that taught the class.
Grade	Enter the letter grade the student earned.
GPA Points	Enter the number of grade points the student received for this grade.
Added Value	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values.

Percent	Enter the percent grade the student earned.
Citizenship	Enter the citizenship grade for the term.
Earned Credit Hours	Enter the number of credit hours the student earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.
Potential Credit Hours	Enter the total number of credit hours the student could have earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.
Credit Type	If you could not match the course in which the student received this grade to a course at your school and you entered a course name, enter the credit type that counts towards the requirement if this grade fulfills a specific graduation requirement at your school. For example, if a student earned the grade in Russian, and your school does not offer Russian, enter **Russian** in the Course Name field. Then, to have the grade the student earned count towards the foreign language graduation requirement, enter **Foreign Language** or a similar credit type name in this field. Otherwise, deselect the checkbox.
Grade Suppression Policy Override	To override the section or course's grade scale grade suppression policy, choose the grade suppression policy you want to apply from the pop-up menu. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.

Grade Suppression Calculation	Do one of the following: • Select **Include** to include the grade in the Grade Suppression calculation. • Select **Exclude** to exclude the grade from the Grade Suppression calculation. **Note:** The repeated course suppression process automatically runs after clicking **Submit**. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Exclude from GPA?	Do one of the following: • Select **Include** to include the grade in the GPA calculation. • Select **Exclude** to exclude the grade from the GPA calculation.
Exclude from Class Rank?	Do one of the following: • Select **Include** to include the grade in the class rank calculation. • Select **Exclude** to exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Do one of the following: • Select **Include** to include the grade in the honor roll calculation. • Select **Exclude** to exclude the grade from the honor roll calculation.
Teacher Comment	Enter any comments from the teacher.

5. Click **Submit**. The Historical Grades page displays the new grade.

How to Create Multiple Historical Grades Entries

This option for entering historical grades is helpful when a student transfers from another school and all previous grades must be entered in PowerSchool.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Multiple New Entries**. The Academic Record Entry page appears.
4. Use the following table to enter information in the fields:

Field	Description
School Name	Enter the name of the school where the student received the grade.
School Year	Enter the year for which you want to enter a grade.
Hist. Grade Level	Enter the grade level of the student when he or she received the grade.
Grade Suppression Policy Override	To override the section or course's grade scale grade suppression policy, choose the grade suppression policy you want to apply from the pop-up menu. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Calculation	Do one of the following: • Select **Include** to include the grade in the Grade Suppression calculation.

	• Select **Exclude** to exclude the grade from the Grade Suppression calculation. **Note:** The repeated course suppression process automatically runs after clicking **Submit**. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Store Code	Enter the store code that your school uses for the term in which the student earned the grade. Store codes are determined in the final grade setup area on the School Setup page.

5. Use the following table to enter information for each course per term in the indicated school year:

Field	**Description**
Course Number - Section Number [or] Course Name	You must provide one of the following: • The course and section number of an existing section at the currently selected school. • The course name if this is historical data for which no section record exists. If you provide a course and section, this grade will be associated with the student's enrollment in that section and will print on report cards. If you supply only the course name, the grade will print on transcripts but not on report cards since it is not associated with an actual section enrollment. In either case, the grade will be included in transcripts, the Previous Grades screen, and GPA calculations.
Teacher Name	Enter the name of the teacher that taught the class.

Credit Type	If you could not match the course in which the student received this grade to a course at your school and you entered a course name, enter the credit type that counts towards the requirement if this grade fulfills a specific graduation requirement at your school. For example, if a student earned the grade in Russian, and your school does not offer Russian, enter **Russian** in the Course Name field. Then, to have the grade the student earned count towards the foreign language graduation requirement, enter **Foreign Language** or a similar credit type name in this field. Otherwise, deselect the checkbox.
Exclude from GPA?	Do one of the following: • Select **Include** to include the grade in the GPA calculation. • Select **Exclude** to exclude the grade from the GPA calculation.
Exclude from Class Rank?	Do one of the following: • Select **Include** to include the grade in the class rank calculation. • Select **Exclude** to exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Do one of the following: • Select **Include** to include the grade in the honor roll calculation. • Select **Exclude** to exclude the grade from the honor roll calculation.
Grade	Enter the letter grade the student earned.
GPA Points	Enter the number of grade points the student received for this grade.

Added Value	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values.
Percent	Enter the percent grade the student earned.
Citizenship	Enter the citizenship grade for the term.
Earned Credit	Enter the number of credit hours the student earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.
Potential Credit	Enter the total number of credit hours the student could have earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.

6. Repeat Step 5 for additional courses.
7. Click **Submit**. The Historical Grades page displays the new grades.

How to Edit a Stored Grade

There are times when it is necessary to change a historical (stored) grade. Because such a change can have a serious impact on a student's permanent record, stored grades must be changed one by one.

Note: You can create a log entry to track each time you change a grade for a student. For more information, see *Log Entries*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click the grade to be changed. The Edit Stored Grade page appears.
4. Use the following table to change a student's historical grade information on the Edit Stored Grades page:

Field	Description
School	The school name appears.
Term ID	Enter the 4-character value of the term associated to the grade. **Note:** If this grade is already associated to a Course Number - Section Number, then this field is not editable. **Note:** The grade does not automatically change with the percentage and vice versa. If you change one, you must manually change the other. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
School Year (Term)	The school year and term appear.
Store Code	The store code appears. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Hist. Grade Level	The grade level in which the student enrolled in the course appears. You can edit the grade level. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Associated Section	The section of the course in which the student was enrolled appears.
Course Number	The number of the course in which the student earned the grade appears.
Course Name	The name of the course in which the student earned the grade appears.
Teacher Name	Enter the name of the teacher of the course section.

Associated Grade Scale	The name of the associated grade scale appears.
Grade	The letter grade originally entered for the student appears. You can edit the grade.
GPA Points	Enter the point value that corresponds to the grade. For example, enter **4.0** for an A. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox appears selected.
Added Value	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox appears selected.
Percent	Enter the percent grade the student earned.
Citizenship	Enter the citizenship grade for the term.
Absences	Enter the number of absences for the course in the term.
Tardies	Enter the number of tardies for the course in the term.
Earned Credit Hours	Enter the number of credit hours the student earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Potential Credit Hours	Enter the total number of credit hours the student could have earned in the course.

	Note: The number of earned credit hours and potential credit hours must be the same. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Credit type	If you could not match the course in which the student received this grade to a course at your school and you entered a course name, enter the credit type that counts towards the requirement if this grade fulfills a specific graduation requirement at your school. For example, if a student earned the grade in Russian, and your school does not offer Russian, enter **Russian** in the Course Name field. Then, to have the grade the student earned count towards the foreign language graduation requirement, enter **Foreign Language** or a similar credit type name in this field. Otherwise, deselect the checkbox.
Grade Suppression Policy Override	To override the section or course's grade scale grade suppression policy, choose the grade suppression policy you want to apply from the pop-up menu. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Code	Indicate the repeated course grade suppression value of the stored grade by choosing one of the following from the pop-up menu: • **Blank** - Stored grade is not for a replaced course grade. • **Replaced Grade (R)** - Stored grade is for a replaced course grade. • **Over Maximum Credit (M)** - Maximum credit hours. **Note:** The repeated course grade suppression value is blank by default unless it has been calculated by the

	permanently store grades process. However, it can be entered manually or adjusted after it has been calculated. If you want to prevent any future grade calculations from changing this value, choose to exclude from grade suppression calculation. When excluded, this value will be ignored during the repeated course grade suppression processing. Selecting **Replaced Grade (R)** does not automatically adjust whether the grade is excluded from transcripts or GPA, honor roll, class rank, or graduation calculations. However, these settings can be adjusted manually. Selecting **Over Maximum Credit (M)** does not automatically adjust whether the grade is excluded from graduation calculation. However, these settings can be adjusted manually. **Note:** If the grade was previously replaced or was replacing another grade, adjusting the repeated course grade suppression value will remove this association. **Note:** This field is only available when editing a stored grade. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Repeated Course Grade Details	Click to view the Repeated Course Grade Details pop-up, which displays the following grade replacement succession: • Grade Order • **Grade** - Click to access the Edit Stored Grade page for the repeated course grade. • Course Number • Course Name • Store Code • Term • Grade Suppression **Note:** The current repeated course grade appears highlighted. **Note:** This link only appears if there are other grades related based on the repeated course grade suppression calculation.

	Note: This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Calculation	Do one of the following: • Select **Include** to include stored grades in grade suppression calculation during the permanently store grades process. • Select **Exclude** to exclude stored grades from grade suppression calculation during the permanently store grades process. Note: If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*. **Note:** If a grade has already been replaced by the Repeated Course Grade Suppression process and then is set to be excluded from the calculation, the Grade Suppression Code and the relationship to the replacing grade will persist and never be considered by subsequent grade suppression calculations. This could cause a grade to replace more than one other grade. To prevent this, clear the **Grade Suppression Code** prior to setting **Grade Suppression Calculation** to **Exclude**.
Display on Transcript	Do one of the following: • Select **Yes** to include stored grade in transcripts. • Select **No** to exclude stored grade from transcripts. **Note:** For more information, see *Transcript Objects*.
GPA Calculation	Do one of the following: • Select **Include** to include the grade in the GPA calculation during the permanently store grades process.

	• Select **Exclude** to exclude the grade from the GPA calculation during the permanently store grades process.
Class Rank Calculation	Do one of the following: • Select **Include** to include the grade in the class rank calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the class rank calculation during the permanently store grades process.
Honor Roll Calculation	Do one of the following: • Select **Include** to include the grade in the honor roll calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the honor roll calculation during the permanently store grades process.
Graduation Calculation	Do one of the following: • Select **Include** to include the grade in the graduation calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the graduation calculation during the permanently store grades process. **Note:** For more information, see *Repeated Course Grade Suppression*.
Teacher Comment	Enter any comments from the teacher.
Change History	A list of any changes to this grade appears.
Repeated Course Grade Suppression	Indicate whether or not to run the repeated course grade suppression process by doing one of the following: • Select the **Run** checkbox to run the repeated course grade suppression process.

	• Deselect the **Run** checkbox if you do not want to run the repeated course grade suppression process. **Note:** If the **Grade Suppression Code** is modified, the checkbox no longer appears. **Note:** By default, the checkbox is not selected. However, if **Term ID**, **Store Code**, **Hist. Grade Level**, **GPA Points**, **Added Value**, **Earned Credit Hours**, **Potential Credit Hours** or **Grade Suppression Calculation** are modified, the checkbox appears selected. **Warning**: Running the Repeated Course Grade Suppression process may affect other stored grades. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.

5. Click **Submit**. A confirmation message appears.

How to Delete a Stored Grade

Before deleting a class from a student's historical grades, be certain this is what you want to do. You are not only deleting the grade from the historical record, you are also deleting the class from the student's permanent record. Though this function does not delete the class from the master schedule, the student's historical grades for this class cannot be retrieved once deleted.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click the grade you want to delete. The Edit Stored Grade page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears. If you delete the last grade for a class, the class no longer appears on the Historical Grades page.

How to Override Course Names

You can override a district-assigned course name if you enter a course name along with a valid course number on the Historical Grade screen. The following rules apply when overriding the course name:

- Course Number is optional. If it is not included, the Course Name is used.
- If a Section Number is entered, it must exist in the system.
- If no Course Name is entered and a valid Course Number is entered, it will default to the name in the Courses table.
- If no Course Name is entered or found, an error dialog appears, and the changes are not saved.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Single New Entry**. The New Stored Grade page appears.

   Note: To change several course names, click Multiple New Entries. The Academic Record – Entry page appears.

4. Enter the course name in the Course name field.
5. Click **Submit**.

How to Edit Previous School Names

Use this function to change or enter the name of the school where a class was taken. If you entered a school name when entering the historical grades, it appears on this page. If you did not enter a school name, do so from this page.

Note: The school names you enter appear on the student's transcript next to the school year during which he or she attended the school. If a student attended more than one school during a school year, each school and the grades the student received at that school appear in separate lists.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Previous School Names**. The Historical School Names page appears.
4. Enter or change the name of the schools where the courses were taken.
5. Click **Submit**. The Changes Recorded page appears.
6. Once you have submitted, you can:

- Click the grade to display the school name on the Edit Stored Grade page.
- Repeat this procedure by leaving the School Name field blank to reset a changed previous school name. The Edit Stored Grade page displays the current school.

Honor Roll

You can view results of honor roll calculations for a single student or a group of students. To view honor roll calculations for a single student, search for and select the student, and then choose Honor Roll from the student pages menu. The Honor Roll page displays all honor rolls the student has received, even if the honor roll was received in another school.

Note: To view honor roll calculations for a group of students, see *How to Run the Honor Roll Report*.

How to View a Student Honor Roll Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Honor Roll** from the student pages menu. The Honor Roll page appears.
3. Use the following table to enter information in the fields:

Type	Description
School Year	The school year when the honor roll was earned.
Grade Level	The historical grade level for this honor roll record.
School Name	The name of the school where honor roll record was issued.
Store Code	The store code for the honor roll record.
Honor Roll Method	The name of the honor roll method that was calculated.
Level Met	The name of the honor roll level earned. Click to access the Edit Honor Roll page.

4. Do one of the following when done viewing:
    - Choose another item from the student pages menu.
    - Click the **Back** button on your browser.

How to Edit Student Honor Roll Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Honor Roll** from the student pages menu. The Honor Roll page appears.
3. Click the level met of the honor roll you want to edit. The Edit Honor Roll page appears.
4. Use the following table to enter information in the fields:

Type	Description
School	The name of the school where the honor roll was earned. This field is read-only.
School Year	The school year when the honor roll was earned. This field is read-only.
Store Code	The store code for the honor roll record. This field is read-only.
Grade Level	The historical grade level for this honor roll record.
Method	The name of the honor roll method that was calculated.
Level	The name of the honor roll level earned.
GPA	The GPA that was used as part of the honor roll calculation.
Message	The text message associated with the honor roll level.
Change History	A text log detailing when changes were made, who made those changes, and what was changed for this record. This field is read-only.

5. Click **Submit**. The changes are reflected immediately, and an entry appears in the change history.

How to Delete Student Honor Roll Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Honor Roll** from the student pages menu. The Honor Roll page appears.
3. Click the level met of the honor roll you want to delete. The Edit Honor Roll page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Teacher Comments

The Teacher Comments page displays any comment that a teacher has entered regarding a student, such as a student's achievement or behavior. Comments can be entered using PowerTeacher or PowerTeacher Gradebook.

If using PowerTeacher, comments can be entered using the Final Grade Entry pages if the Final Grade Entry function has been enabled. For more information, see *Final Grade Entry*. If using PowerTeacher Gradebook, comments can be entered using the Scoresheet Final Grades window. For more information see *Final Grades* in the *PowerTeacher Gradebook User Guide* available on PowerSource.

Note: Teachers using PowerTeacher should **NOT** use PowerTeacher Gradebook.

Note: The Comment Bank is only available in PowerTeacher Gradebook at this time. For more information about creating comments in the comment bank, see *Comment Bank*.

Once a comment is entered, it can be viewed in PowerSchool, PowerTeacher, and the PowerSchool Student and Parent portal.

How to View Teacher Comments

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Teacher Comments** from the student pages menu. The Teacher Comments page appears.
3. Use the following table to view teacher comments:

Field	Description
Reporting Term	By default, the student's schedule for the current term appears. Use the pop-up menu to select a different term.
Exp.	The expression indicates the period and day combination of the course.
Course #	The course number indicates the number used to identify the course.
Course	The name of the course.
Teacher	The name of the teacher teaching the course.
Attendance Points	The number of attendance points the student received for the course, such as absent=1, tardy=2, and present=0.
Comment	Comment entered by teacher. **Note:** If the column is blank, there are no teacher comments.
Show dropped classes	Click to view currently enrolled classes and dropped classes.
Show only current classes	Click to view only currently enrolled classes.

Term Grades

Use this page to view term grades for the selected student. The course, letter grade, percentage points, citizenship grade, and credit hours are noted for each term.

How to View Term Grades

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Term Grades** from the student pages menu. The Term Grades page appears. By default the current year is selected.
3. Click the term tab you want to view.
4. If viewing the current year, click the percentage to view a detailed breakdown of the assignments that make up the grade. The Scores page displays the assignments and the selected student's scores for that class. For more information, see *How to View Student Assignment Scores*.

   Note: Icons indicate the status of assignments. For more information, see the icon legend at the bottom of the page.

The Test Results page displays comprehensive information about a student's test results. Additionally, if your district has set up tests, you can enter, edit, or delete test results for an individual student.

Benchmark Tests

Using the Benchmark Tests tab, you can view comprehensive information about a student's benchmark test results. Benchmark tests may be viewed by test or by standard.

Note: The Benchmark Tests tab only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you. The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Benchmark Tests tab, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.
Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system	Indicates one of the following:

administrator for assistance.	• Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

How to View Benchmark Test Results by Test

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** (default) • **State Benchmark** • **District Benchmark** • **School Benchmark**
View By	Choose the **Test** option.

The following information appears for each test the student has taken:

- Test Name and Description
- Test Date
- Test Score
- Score Group

5. Click the name of the test to view further details.

6. Click the **Benchmark Tests** tab to return to list of benchmark tests.

   Note: For more information, see the *Schoolnet online help*.

How to View Benchmark Test Results by Standard

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** (default) • **State Benchmark** • **District Benchmark** • **School Benchmark**
View By	Choose the **Standard** option.

The following standards information appears for each test the student has taken:

- Standard
- Last Assessed
- Score
- Score Group

5. Click the name of the standard to view further details.
6. Click the **Benchmark Tests** tab to return to list of benchmark tests.

Note: For more information, see the *Schoolnet online help*.

Classroom Tests

Using the Classroom Tests tab, you can view comprehensive information about a student's classroom test results. Classroom tests may be viewed by test or by standard.

Note: The Classroom Tests tab only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you. The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Classroom Tests tab, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.
Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system administrator for assistance.	Indicates one of the following: • Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

How to View Classroom Test Results by Test

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Classroom Tests** tab. Classroom tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** • **Common Classroom** • **My Classroom**
View By	Choose the **Test** option.

The following information appears for each test the student has taken:

- Test Name and Description
- Test Date
- Test Score
- Score Group

5. Click the name of the test to view further details.
6. Click the **Classroom Tests** tab to return to list of classroom tests.

   Note: For more information, see the *Schoolnet online help*.

How to View Classroom Test Results by Standard

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Classroom Tests** tab. Classroom tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.

Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** • **Common Classroom** • **My Classroom**
View By	Choose the **Standard** option.

The following standards information appears for each test the student has taken:

- Standard
- Last Assessed
- Score
- Score Group

5. Click the name of the standard to view further details.
6. Click the **Classroom Tests** tab to return to list of classroom tests.

   Note: For more information, see the *Schoolnet online help*.

Standardized Tests

Using the Standardized Tests tab, you can view comprehensive information about a student's classroom test results.

Note: The Standardized Tests tab only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you. The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Standardized Tests tab, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.

Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system administrator for assistance.	Indicates one of the following: • Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

How to View Standardized Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Standardized Tests** tab. Standardized tests for the selected student appear.
4. Choose the **School Year** from the pop-up menu. The following information appears for each standardized test the student has taken:
    - Section
    - Score Group
    - Raw Score
    - Scaled Score
5. Click the name of a standardized test to view test details.
6. Click the **Standardized Tests** tab to return to list of standardized tests.

    Note: For more information, see the *Schoolnet online help*.

PowerSchool Test Scores

Using the PowerSchool Test Scores tab, you can easily manage test results for an individual student.

Note: In order for tests to appear in the **Enter New Test** pop-up menu, they must first be created using *Tests Setup*.

Note: If Analytics is enabled, click **Analytics Student View** to view the Analytics Student View page. For more information, see *Enable Analytics*.

How to Enter Student PowerSchool Test Scores

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **PowerSchool Test Scores** tab.
4. Choose a test from the **Enter New Test** pop-up menu. If selecting the test that currently appears, click **Submit**. The New Student Test: [Test Name] page appears.

   Note: is not necessary to have all three score types (number, percent, or alpha) when importing a score. Import one, two, or all three score .

5. Use the following table to enter information in the fields:

Field	Description
Test	The selected test appears.
Date	Enter the date of the test using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Term	Choose the term from the pop-up menu.
Grade Level	Enter the grade level for the test.
Score	For each of the test results, enter the number score, the percent score, and the alpha letter grade.

6. Click **Submit**. The Test Results page displays the new test score for that student.

How to Import PowerSchool Test Scores

Use the Import Test Results function when setting up your initial PowerSchool data, enrolling a large number of new or transferring students, or entering test results for students after receiving the test results. Before importing test results, you must have an ASCII text file containing the test score data being imported, preferably delimited by tabs.

The following table displays a sample import file for eleventh graders who recently took the ACT. This example shows an import file reporting the numeric scores, test date, and students' grade level at the time the test was given. The test results are named Composite, English, Math, Reading, and Science.

student_number	Date	grade_level	composite	english	math	reading	science
645236653	8/7/03	11	18	18	17	16	21
645236741	8/7/03	11	28	29	27	29	25
645236654	8/7/03	11	18	14	22	19	18

To record the numeric, percentage, and alphanumeric scores for test results, use the following numeric suffixes after the column headings and one space:

- [Column name] 1: Displays the numeric score. For example, include in the Math 1 column the scores 17, 27, and 22.
- [Column name] 2: Displays the percentage score. For example, include in the Math 2 column the scores 57%, 90%, and 73%.
- [Column name] 3: Displays that alphanumeric score. For example, include in the Math 3 column the scores F, A-, and C.

Note: It is not necessary to have all three score types (number, percent, or alpha) when importing a score. Import one, two, or all three score types.

The following table displays a sample import file for eleventh graders who recently took a district-level math test. This example shows an import file reporting the numeric, percentage, and alphanumeric scores, test date, and students' grade level at the time the test was given.

student_number	Date	grade_level	Math 1	Math 2	Math 3
645236653	8/7/03	11	17	57	F

645236741	8/7/03	11	27	90	A-
645236654	8/7/03	11	22	73	C

Before importing test results, you must first create a test and its scores. For more information, see *How to Create New Tests* and *How to Create Test Scores*.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Quick Import**. The Quick Import page appears.
4. Use the following table to enter information in the fields:

Field	Description
Table	Choose the **Test Results** table from the pop-up menu.
Field delimiter	Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. If you choose **Other**, enter the delimiter in the field.
End-of-line marker	Choose the end-of-line marker from the pop-up menu. This refers to the item that will separate the records in the exported data. If you choose Other, enter the delimiter in the field. • **CR:** Carriage return • **CRLF:** Carriage return line feed • **LF:** Line feed
File to import	Click **Browse...** next to the File to import field. Navigate to the data file and click b.

Suggest field map	Select the checkbox to have the system suggest PowerSchool field names for the information in the data file. These are just suggestions and can be changed.
School	The selected school appears.

5. Click **Import**. The Select Test page appears.
6. Choose a test from the **Test** pop-up menu. If the test you want does not appear, create it. For more information, see *How to Create New Tests*.
7. Click **Submit**. The Import Records from an ASCII Text File page appears.
8. Choose the PowerSchool field into which you want to enter each value from the To PowerSchool pop-up menu.
9. Select the checkbox to exclude the first row. Depending on the text file, the first row may include information about the file and not about the student test results.
10. Enter the imported value you want to use in the unmapped field and choose the PowerSchool field from the pop-up menu.
11. Click **Submit**. The Import Progress page displays the records that were successfully imported and those that the system could not import because of your specifications. The system imports the data into the Test Scores table. Depending on the type of data, you can view, edit, and report on it.

How to Edit Student PowerSchool Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **PowerSchool Test Scores** tab.
4. Click the name of the test you want to edit. The Edit Student Test: [test name] page appears.
5. Edit the information as needed. For field descriptions, see *How to Enter Student Test Results*.
6. Click **Submit**. The Test Results page displays the edited test score for that student.

How to Delete Student PowerSchool Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.

3. Click the **PowerSchool Test Scores** tab.
4. Click the name of the test you want to delete. The Edit Student Test: [test name] page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Delete page appears.

Graduation Planner User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

With the introduction of Graduation Planner, PowerSchool now provides a more robust tool for planning a student's academic career, tracking and reporting on their progress, and evaluating graduation readiness.

Note: Graduation Planner may be used as an alternative to or in conjunction with Graduation Requirements and Graduation Sets.

State Reporting

Graduation Planner is available for all states. However, at this time certain states will need to continue to use Graduation Requirements and Graduation Sets to ensure correct information is reported on their state-required reports. Refer to state-specific Tech Notes available on PowerSource for more information on whether or not your state requires the continued use of Graduation Requirements and Graduation Sets. For those states identified, Graduation Planner may be used, but required state reporting information will be reported out of Graduation Requirements and Graduation Sets.

District Setup

To get started, the following setup must be performed:

- Create a graduation plan.
- Edit all/individual version(s) of a graduation plan.
- Create a subject group.
- Create a credit assignment strategy.

Graduation Plans

Graduation plans provide the mechanism for schools to determine graduation requirements based on credit hours. There are two types of graduation plans you can create: graduation contracts and post-secondary preparation plans. Graduation contracts define the requirements a student must fulfill in order to graduate high school. Post-secondary preparation plans define the requirements a student must fulfill in order to attend a post-secondary institution, such as a state college or university.

How to View Graduation Plans

Use this procedure to view a list of all existing graduation plans.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Note the following information appears for each graduation plan:

Field	Description
Graduation Plan	The name of the graduation plan. Click to edit a graduation plan. For more information, see *How to Edit a Graduation Plan*.
Version	The versions of the graduation plan. Click the version of the graduation plan you want to edit. For more information, see *How to Edit a Graduation Plan Version*. Click the **Plus (+)** button to create a new graduation plan version. For more information, see *How to Create a Graduation Plan Version*.

Summary	The subject group(s) and requirements for each graduation plan.
Select Students	Click to make students associated to the graduation plan the current student selection and to display the student pages.
New Graduation Plan	Click to create a new graduation plan.

How to Create a Graduation Plan

Use this procedure to add as many graduation plans as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click **New Graduation Plan**. The Edit Graduation Plan appears.
4. Use the following table to enter information in the fields:

Field	Description
Graduation Plan Name	Enter the name of the graduation plan. The name must be unique for the district.
Is Post-Secondary	Do one of the following: • Leave this checkbox blank to create a graduation contract. • Select the checkbox to create a post-secondary graduation plan.

5. Click **Submit**. The Graduation Planner Setup page displays the new graduation plan.

How to Edit a Graduation Plan

Use this procedure to edit graduation plan details.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the name of the graduation plan you want to edit. The Edit Graduation Plan appears.
4. Use the following table to edit information in the fields:

Field	**Description**
Graduation Plan Name	Enter the name of the graduation plan. The name must be unique for the district.
Is Post-Secondary	Do one of the following: • To create a graduation contract, leave this checkbox blank. • To create a post-secondary graduation plan, select the checkbox.
Plan Versions	The versions of the graduation plan. Click the version of the graduation plan you want to edit. For more information, see *How to Edit a Graduation Plan Version*. Click the **Plus (+)** button to create a new graduation plan version. For more information, see *How to Create a Graduation Plan Version*.
Select Students in Plan	Click to make students associated to the graduation plan the current student selection and to display the student pages.

5. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Graduation Plan

Use this procedure to delete a graduation plan that may have been created in error or that is no longer in use.

Note: If a graduation plan is associated to a student, it cannot be deleted. First remove all students and then the graduation plan may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the name of the graduation plan you want to delete. The Edit Graduation Plan appears.
4. Click **Delete**. The Graduation Planner Setup page appears.

How to Convert a Graduation Set into Graduation Plan

Use this procedure to convert an existing graduation set into a graduation plan. For more information, see Graduation Sets.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click the name of the graduation set you want to edit. The Graduation Requirement Set page appears.
4. Click **Convert to Graduation Plan**. The Edit Graduation Plan page appears.
5. View the created graduation plan to confirm it is correct. For more information, see *How to View a Graduation Plan*.

Graduation Plan Versions

Initially, each graduation plan is created as a single version, which is defined as valid for students entering the plan from the start of time ("0") through the end of time ("9999"). If the requirements for a particular plan change in any year, you can modify the existing plan so that it ends the previous year, and create a new version, which starts the year of the change (and remains in effect forever).

How to Create a Graduation Plan Version

Use this procedure to add as many versions needed for this graduation plan.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Plus (+)** button next to the graduation plan for which you want to create a new version. The Edit Graduation Plan Version page appears.
4. Use the following table to enter information in the fields:

Field	Description
Graduation Plan Name	The name of the graduation plan.
Version Applies to Years	Enter the start time and end time of the gradation plan. **Note:** Multiple versions in a plan may not overlap years.

5. Click **Submit**. The Graduation Planner Setup page appears.

How to Copy a Graduation Plan Version

Use this procedure to create a new copy of the given version, starting in a specified year. The system automatically adjusts other versions so that any version, which includes the new version's starting year, will end the year before, and the new version will continue as long as that old version did. This allows you to quickly "split" versions for a given year of entry.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan you want to edit. The Edit Graduation Plan Version appears.
4. Click **Copy Version** to create a copy of this graduation plan. The Copy Version pop-up appears.
5. Enter the appropriate year in the **Create copy starting in year** field.
6. Click **Submit**. The Copy Version pop-up closes, and the Graduation Planner Setup page appears.
7. Click **Submit**. The Graduation Planner Setup page appears.

How to Edit a Graduation Plan Version

Use this procedure to edit graduation plan version details.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.

3. Click the version of the graduation plan you want to edit. The Edit Graduation Plan Version appears.
4. Use the following table to edit information in the fields:

Field	Description
Graduation Plan Name	The name of the graduation plan. Click to edit the graduation plan. For more information, see *How to Edit a Graduation Plan*.
Version Applies to Years	The start year and end year of the gradation plan. **Note:** Multiple versions in a plan may not overlap years.
Copy Version	Click to create a copy of this graduation plan. For detailed information, see *How to Copy a Graduation Plan Version*.
Order Selectors	Click to indicate the order by which credit type is applied to requirements. For detailed information, see *How to Use Order Selectors*.
Required Tests	
Name	The name of a required test.
Number Score	The numerical score value required in order to meet the requirement.
Percentage Score	The percentage score value required in order to meet the requirement.
Alpha Score	The alpha score value required in order to meet the requirement.
Action	Waiver Allowed, indicating waiving the required test is permitted, appears if the **Allow Waiver** checkbox is selected on the Edit Graduation Plan Test Requirements page.
Configure	Click to access the Edit Graduation Plan Test Requirements page where you can add, edit, and delete required tests. For more information, see *Required Tests*.

Subject Groups	
Subject Group	The name of the subject group or child subject group within this version of the graduation plan. Click the name of a subject group or child subject group to edit the graduation plan requirement. For detailed information, see *Graduation Plan Subject Groups.* Click the **Plus (+)** button (on the left) next to the graduation plan for which you want to create a subject group. For detailed information, see *Graduation Plan Subject Groups.* **Note:** If the **Plus (+)** button does not appear, hover over the subject group for which you want to create a subject group.
Credit Required	At the top level, the total credits required to complete this version of the graduation plan. At the subject group and child subject group level, the total credits required within the subject group or child subject group to complete this version of the graduation plan. Click to edit the graduation plan requirement. For detailed information, see *Graduation Plan Subject Groups*.
Course Numbers	The courses assigned to the credit assignment strategy. Click to edit graduation plan requirement. For detailed information, see *Credit Assignment Strategies*.
Credit Assignment Strategy	The name of the credit assignment strategy. **Note: No Targets Defined** indicates there are orphaned records. To resolve, click the course number(s) or No Courses Selected to access the Edit Graduation Plan Selector page where you can assign one or more subject groups or delete the assignment strategy altogether. Click to edit graduation plan requirement. For detailed information, see *Credit Assignment Strategies*. Click the **Plus (+)** button (on the right) next to the graduation plan for which you want to create a credit assignment strategy. For detailed information, see *Credit Assignment Strategies.*

	Note: If the **Plus (+)** button does not appear, hover over the subject group for which you want to create a credit assignment strategy.
Select Students in Version	Click to make students associated to the graduation plan version the current student selection and to display the student pages.

5. To work with subject groups, see *Graduation Plan Subject Groups*.
6. To work with requirements, see *Credit Assignment Strategies*.
7. Click **Submit**. The Graduation Planner Setup page appears.

How to Use Order Selectors

Use this procedure to indicate the order by which credits are applied to selectors (subject groups). Selector order is only important when multiple selectors (subject groups) might all select a given credit type. This may happen when a single course appears in multiple selectors (subject groups), or when selectors (subject groups) include credit types. The "top" selector (subject group) will have the first opportunity to match any credit the student earns.

Note: If you have a mix of more-specific and less-specific selectors (subject groups), be sure the more-specific selectors are higher up in the list, as credit is applied to the first matching selector (subject group) in the list regardless of specificity.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan you want to edit. The Edit Graduation Plan Version appears.
4. Click **Order Selectors** to indicate the order by which credit type is applied to requirements. The Order Selectors pop-up displays a list of selectors.
5. Use the up and down arrows to sort the requirements.
6. Click **Submit**. The Order Selectors pop-up closes, and the Graduation Planner Setup page appears.

How to Delete a Graduation Plan Version

Use this procedure to delete a graduation plan version that may have been created in error or that is no longer in use.

Note: If a graduation plan version is associated to a student, it cannot be deleted. First remove all students and then the graduation plan version may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan you want to delete. The Edit Graduation Plan Version appears.
4. Click **Delete**. The Graduation Planner Setup page appears.

Required Tests

Once you have created a graduation plan, you can then add required tests to that graduation plan to track test scores, such as ACT, STAR, etc. If required tests are added, they will appear on the Graduation Plan Progress page, the Graduation Progress Report, the Graduation Plan Progress page in PowerScheduler, on the Graduation Progress page in PowerTeacher, and on the Graduation Progress page in the PowerSchool Student and Parent portal.

How to Add a Required Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to add a required test. The Edit Graduation Plan Version appears.
4. Click **Configure**. The Edit Graduation Plan Test Requirements page appears.
5. Click **Add**. The Add Required Test pop-up appears.
6. In the Step1: Choose Test section, select the option of the test you want to require.
7. Click **Next**.
8. In the Step 2: Choose Test Scores section, select the type of test scores you want to require.
9. Click **OK**. The Add Required Test pop-up closes. The Edit Graduation Plan Test Requirements page displays the test and test scores you selected.
10. Use the following table to enter information in the fields:

    Note: Once a score is entered, all other score types appear shaded.

Field	**Description**

Name	The name of the test score.
Number Score	Choose the comparator from the pop-up menu and then enter a numeric score.
Percent Score	Choose the comparator from the pop-up menu and then enter a percentage score.
Alpha Score	Enter an alpha score.
Action	Select the **Allow Waiver** checkbox to allow this required test to be waived. Click **Delete** next to the test score you want to delete.

11. Click **Submit**. The Edit Graduation Plan Version page appears.

How to Edit a Required Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to edit a required test. The Edit Graduation Plan Version appears.
4. In the Required Tests section, click **Configure**. The Edit Graduation Plan Test Requirements page appears.
5. Edit as needed. For field descriptions, see *How to Add a Required Test*.
6. Click **Submit**. The Edit Required Test drawer closes, and a confirmation message appears.

How to Delete a Required Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to edit a required test. The Edit Graduation Plan Version appears.

4. In the Required Tests section, click **Configure**. The Edit Graduation Plan Test Requirements page appears.
5. Click the **Delete** icon next to the test score you to delete.
6. **Note:** Deleting the last test score associated to a required test, deletes the required test altogether.
7. Click **Submit**. The Edit Required Test drawer closes, and a confirmation message appears.

Subject Groups

Once you have created a graduation plan, you then create subject groups within that graduation plan to track credit hours for specific subject areas, such as Arts, Electives, English, Foreign Language, Health, Math, Science, Social Studies, etc.

How to Create a Subject Group

Use this procedure to add as many subject groups needed for this graduation plan.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to create a subject group. The Edit Graduation Plan Version appears.
4. Hover over the subject group for which you want to create a subject group. The subject group appears highlighted and two Plus (+) buttons become visible.
5. Click the **Plus (+)** button (on the left) next to the graduation plan for which you want to create a subject group. The Edit Graduation Plan Requirement page appears.
6. Use the following table to enter information in the fields:

Field	Description
Path to Node	By default, the newly created subject group will appear at the bottom of the subject group list. To move the subject group: 1. Click the **Pencil** icon to change the placement of the subject group within the list. The Placement of Requirement pop-up appears. 2. Do one of the following:

	• Select the **As First Child Of** option to make the subject group a subset of the selected subject group. • Select the **After Siblings** to make the subject group appear after the selected subject group. 3. Click **Enter**. The Placement of Requirement pop-up closes.
Name	Enter the name of the subject group within the graduation plan used to track credit hours for a specific subject area.
Credit Required	Enter the number of the required credits.
Allow Waiver	Select the checkbox to enable the ability to waive graduation requirements for students within this subject group. Otherwise, leave blank.
Allow Any of the Child Subject Groups	Select the checkbox to enable the ability to create multiple paths within a subject group for a graduation plan. Otherwise, leave blank.

7. Click **Submit**. The Edit Graduation Plan Version page appears.

How to Create a Child Subject Group

Use this procedure to add as many child subject group as needed for this graduation plan.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to create a child subject group. The Edit Graduation Plan Version appears.
4. Hover over the subject group for which you want to create a child subject group. The subject group appears highlighted and two Plus (+) buttons become visible.
5. Click the **Plus (+)** button (on the left) next to the graduation plan for which you want to create a child subject group. The Edit Graduation Plan Requirement page appears.

6. Enter the information as needed. For field description, see *How to Create a Subject Group*.
7. Click **Submit**. The Edit Graduation Plan Version page appears.

How to Edit a Subject Group

Use this procedure to edit a subject group or child subject group details.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to edit a subject group or child subject group. The Edit Graduation Plan Version appears.
4. Click the name of the subject group of child subject group you want to edit. The Edit Graduation Plan Requirement page appears.
5. Edit the information as needed. For field description, see *How to Create a Subject Group*.
6. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Subject Group

Use this procedure to delete a subject group or child subject group that may have been created in error or that is no longer in use.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to delete a subject group or a child subject group. The Edit Graduation Plan Version appears.
4. Click the name of the subject group or child subject group you want to delete. The Edit Graduation Plan Requirement page appears.
5. Click **Delete**. The Graduation Planner Setup page appears.

Credit Assignment Strategies

Once you have created a subject group, the subject group can then be associated to courses and/or credit types, which determines how credit is tracked. Additionally, you may set the assignment strategy for a subject group, which allows overflow credit, any credit that is above and beyond the subject group's credit hour requirements, to be assigned to another subject group.

How to Create a Credit Assignment Strategy

Use this procedure to create a credit assignment strategy by associating courses and/or credit types to a selected subject group.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to create a credit assignment strategy. The Edit Graduation Plan Version appears.
4. Hover over the subject group for which you want to create a credit assignment strategy. The subject group appears highlighted and two Plus (+) buttons become visible.
5. Click the **Plus (+)** button (on the right) next to the graduation plan for which you want to create a credit assignment strategy. The Edit Graduation Plan Selector page appears.
6. Use the following table to enter information in the fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Description</td><td>The name of the subject group or child subject group appears. Edit if needed.</td></tr>
<tr><td>Credits from Courses</td><td>1. Click Query to Select.
2. Enter your search criteria:
a. To search for by course name, select the Course Name checkbox and enter the name of the course you want to search for.
b. To search for by course number, select the Course Number checkbox and enter the number of the course you want to search for.
c. To search by other criteria:
1. Click Add Query Criterion and choose another search criteria from the pop-up menu. A secondary pop-up menu appears based on your selection.</td></tr>
</table>

	2. Choose the appropriate value from the pop-up menu. 3. Enter the appropriate value in the field (if applicable). 4. Repeat Step 1 through Step 3 for each additional criterion. 3. Click **Query**. Results appear in the Found Course list box. 4. In the Found Courses list box, click the course(s) that you want to associate to the graduation plan selector. The course(s) appear in the Selected list box. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.
Or with Credit Types	Enter the appropriate credit types. Separate multiple credit types with commas **Note:** If a credit type is entered, the stored grades which match this selector include not only those from any selected courses, but also those with the given credit type. This allows a district to bring in out-of-district transcripts without giving a student course-specific credit.
Assign Into	In the list box on the left, click the name of the graduation requirements you want to assign the selected course(s) to. The selected graduation requirements appear in the list box on the right. Credits for the selected courses or credit types will be allocated to the first requirement in the list until it is full, then to the next requirement. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.

7. Click **Submit**. The Graduation Planner Setup page appears.

How to Edit a Credit Assignment Strategy

Use this procedure to edit a credit assignment strategy.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to edit a credit assignment strategy. The Edit Graduation Plan Version appears.
4. Click the course numbers of the subject group for which you want to edit a credit assignment strategy. The Edit Graduation Plan Selector page appears.
5. Edit the information as needed. For field descriptions, see *How to Create a Credit Assignment Strategy*.
6. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Credit Assignment Strategy

Use this procedure to delete a credit assignment strategy that may have been created in error or that is no longer in use.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the version of the graduation plan for which you want to delete a credit assignment strategy. The Edit Graduation Plan Version appears.
4. Click the course numbers of the subject group for which you want to delete a credit assignment strategy. The Edit Graduation Plan Selector page appears.
5. Click **Delete**. The Graduation Planner Setup page appears.

Graduation Waivers

If the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled for a subject group, you can waive graduation requirements for students within the subject group.

How to Add a Waiver Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click **Add** in the Waiver Type section. The Add Type drawer appears.

5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the waiver type.
Code	Enter the code of the waiver type.
Description	Enter a description of the waiver type.

6. Click **Submit**. The Graduation Planner Setup page appears.

How to Edit a Waiver Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click the **Pencil** icon next to the waiver type you want to edit. The Edit Type drawer appears.
5. Edit as needed. For detailed field descriptions, see *How to Add a Waiver Type*.
6. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Waiver Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click the **Delete** icon next to the waiver type you want to delete. The Delete Type drawer appears.
5. Click **Submit**. The Graduation Planner Setup page appears.

How to Add a Waiver Source

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click **Add** in the Waiver Source section. The Add Source drawer appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the waiver source.
Code	Enter the code of the waiver source.
Description	Enter a description of the waiver source.

6. Click **Submit**. The Graduation Planner Setup page appears.

How to Edit a Waiver Source

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click the **Pencil** icon next to the waiver source you want to edit. The Edit Source drawer appears.
5. Edit as needed. For detailed field descriptions, see *How to Add a Waiver Source*.
6. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Waiver Source

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click the **Delete** icon next to the waiver source you want to delete. The Delete Source drawer appears.
5. Click **Submit**. The Graduation Planner Setup page appears.

How to Add a Waiver Reason

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click **Add** in the Waiver Reason section. The Add Reason drawer appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the waiver reason.
Code	Enter the code of the waiver reason.
Description	Enter a description of the waiver reason.

6. Click **Submit**. The Graduation Planner Setup page appears.

How to Edit a Waiver Reason

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.
4. Click the **Pencil** icon next to the waiver reason you want to edit. The Edit Reason drawer appears.
5. Edit as needed. For detailed field descriptions, see *How to Add a Waiver Reason*.
6. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Waiver Reason

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Graduation Planner Setup**. The Graduation Planner Setup page appears. By default, the **Contracts** tab is selected.
3. Click the **Waivers** tab.

4. Click the **Delete** icon next to the waiver reason you want to delete. The Delete Reason drawer appears.
5. Click **Submit**. The Graduation Planner Setup page appears.

School Setup

Once you are finished setting up graduation planner at the district level, the following setup must be performed at the school level:

- Set the Options for Presuming Complete setting.
- Set the Allow Students/Parents to See Graduation Plan Progress setting.
- Set the Allow Students/Parents to Select Post-Secondary Plans setting.

Options for Presuming Complete

Entering value indicates the number of days after the end of enrollment that you want graduation plans to include the enrollment as in progress. This number allows the administrator some number of days between the end of a term and the storage of grades for that term. A negative number allows specification of the number of days before the day the enrollment ends, for instances where the school typically records grades prior to enrollments ending (rare).

How to Set Options for Presuming Complete

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade Setup**. The Final Grade Setups page appears.
3. Enter the appropriate value in the **Options for presuming complete** field.
4. Click **Submit**. The Final Grades Setups page displays the new final grade.

Allow Students/Parents to See Graduation Plan Progress

Using the **Allow students/parents to see Graduation Plan Progress** setting, indicate whether or not you want parents and students to be able to access the Graduation Plan Progress page in the PowerSchool Student and Parent portal. For more information, see *Graduation Plan Progress*.

How to Enable/Disable the Graduation Plan Progress Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Graduation Planner Setup**. The Graduation Planner Setup page appears.
3. Do one of the following:

- Select the **Allow students/parents to see Graduation Plan Progress** option to permit students/parents to access the Graduation Plan Progress page in the PowerSchool Student and Parent portal.
- Deselect the **Allow students/parents to see Graduation Plan Progress** option to not permit students/parents to access the Graduation Plan Progress page in the PowerSchool Student and Parent portal.

4. Click **Submit**. The Graduation Planner Setup page refreshes.

Allow Students/Parents to Select Post-Secondary Plans

Using the **Allow students/parents to select Post-Secondary Plans** setting, indicate whether or not you want the **Select Post-Secondary Plans** link to appear on the Graduation Plan Progress page in the PowerSchool Student and Parent portal. For more information, see *Post-Secondary Graduation Plans*.

How to Enable/Disable the Post-Secondary Plans Selection

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Graduation Planner Setup**. The Graduation Planner Setup page appears.
3. Do one of the following:
    - Select the **Allow students/parents to select Post-Secondary Plans** option to permit students/parents to access the post-secondary plans selector on the Graduation Plan Progress page in the PowerSchool Student and Parent portal.
    - Deselect the **Allow students/parents to select Post-Secondary Plans** option to not permit students/parents to access the post-secondary plans selector on Graduation Plan Progress page in the PowerSchool Student and Parent portal.
4. Click **Submit**. The Graduation Planner Setup page refreshes.

Students

Once graduation planner is set up, you can then conduct student searches based on graduation planner information.

Search by Graduation Plan

To search for students based on graduation plan, you can use the **Search Students** function on the PowerSchool Start Page using the alias **GradPlan**. As with all searches, GradPlan searches may be chained. Using any of the following comparators, you can find students with grad plans where the name matches the given criteria:

Comparator	Meaning
=	Equals
#	Does not equal
in	Is [field] present in the search argument?
contains	Is the search argument contained in the [field]?

For more information about searching, see *Student Search*.

How to Search for Students By Graduation Plan

For example, to select all of your 12th graders in the "MIT" plan:

1. On the start page, enter **GradPlan contains MIT** in the **Search Students** field.
2. Click the **Search** icon. The page displays a list of all students with graduation plans that contain “MIT” in the name.
3. Enter **&Grade_Level is 12** in the **Search Students** field. The page narrows the list of students to only those students with graduation plans that contain “MIT” in the name and who are in the twelfth grade.
4. Do one of the following:
    - Click the name of the student whose record you want to work with.
    - To work with the entire group of students, choose a function from the group functions pop-up menu at the bottom of the list.

Once graduation planner is set up, you can then begin working with students managing graduation plans and generating graduation progress summaries.

Graduation Plans

Using the Graduation Plan Selection page, you can manage graduation plans for individual students.

How to Select a Graduation Plan

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Selection** from the student pages menu. The Graduation Plan Selection page appears.
3. Use the following table to enter information in the fields:

Field	Description
Year Entering Graduation Plan	Enter the year the student will begin the graduation plan. **Note:** This setting affects the default version the student will be assigned if the name is selected instead of a specific version.
Graduation Contracts	In the list box on the left, click the name or the specific version of the graduation contract you want to select. The selected graduation contract appears in the list box on the right. To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button. If selecting multiple graduation contracts, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page. **Note:** If the name is selected instead of a specific version, the student will be assigned the version of the plan, which matches their **Year Entering Graduation Plan** setting.

Year Entering Post-Secondary School	Enter the year the student will go to the post-secondary school. **Note:** This setting affects the default version the student will be assigned if the name is selected instead of a specific version.
Post-Secondary Preparation Plans	In the list box on the left, click the name or the specific version of the post-secondary preparation plan you want to select. The selected post-secondary preparation plan appears in the list box on the right. To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button. If selecting multiple post-secondary preparation plans, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page. **Note:** If the name is selected instead of a specific version, the student will be assigned the version of the plan, which matches their **Year Entering Post-Secondary Preparation Plans** setting.

4. Click **Submit**. The Graduation Plan Progress page appears.

How to Edit a Graduation Plan Selection

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Selection** from the student pages menu. The Graduation Plan Selection page appears.
3. Edit the information as needed. For field descriptions, see *How to Select a Graduation Plan*.
4. Click **Submit**. The Graduation Plan Progress page appears.

How to Remove a Graduation Plan

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Selection** from the student pages menu. The Graduation Plan Selection page appears.

3. Use the following table to enter information in the fields:

Field	Description
Graduation Contracts	To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button.
Post-Secondary Preparation Plans	To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button.

4. Click **Submit**. The Graduation Plan Progress page appears.

Graduation Plan Progress

Note: This procedure may also be performed via **Start Page > PowerScheduler > Selected Students > Graduation Plan Progress**.

How to View a Student's Graduation Plan Progress

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page displays the following information for each plan:

Field	Description
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens.

	2. Review information. 3. Click **Close**.
Required Tests	
Test Name	The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc. Click to view detailed information.
Action	If the **Allow Waiver** checkbox on the Edit Graduation Plan Test Requirements page has been enabled, you can waive the required test. To add a waiver to a required test, see *How to Add a Required Test Waiver*. To edit a waiver for a required test, see *How to Edit a Required Test Waiver*. To delete a waiver from a required test, see *How to Delete a Required Test Waiver*.
Attempts	The number of times the student has taken the required test.
Completed	Indicates whether the student has passed, failed, waived, or has not taken the required test.
Subjects Groups	
Subject Group	The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information: 1. Click the name of a subject group. The [Subject Group] drawer opens. 2. Review information. 3. Click **Close**.
[Waiver]	If the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled for a subject group, you can waive graduation requirements for students within the subject group.

	To add a waiver to a subject group, see *How to Add a Subject Group Waiver*. To edit a waiver for a subject group, see *How to Edit a Subject Group Waiver*. To delete a waiver from a subject group, see *How to Delete a Subject Group Waiver*.
Earned	The total number (and individual number) of credits for courses within the subject group that the student has earned.
Enrolled	The total number of courses within the subject group that the student is currently enrolled in.
Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.
Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: • Dark green indicates completed credits. • Green indicates current enrollments. • Blue indicates waived credits. • Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

How to Add a Required Test Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Required Tests section, click the **Plus (+)** button next to the required test for which you want to add a waiver. The Add Waiver drawer opens.
4. Use the following table to enter information in the fields:

Field	Description
Test Name	The name of a required test.
Waiver Type	Choose a waiver type from the pop-up menu.
Waiver Reason	Choose a waiver reason from the pop-up menu.
Waiver Source	Choose a waiver source from the pop-up menu.
Waiver Date	Indicate the date the waiver is effective.
Authorized By	Choose the name of the person authorizing the waiver from the pop-up menu.

5. Click **Submit**. The Add Waiver drawer closes.

How to Edit a Required Test Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Required Tests section, click the **Pencil** icon next to the required test for which you want to edit a waiver. The Edit Waiver drawer opens.
4. Edit as needed. For detailed field descriptions, see *How to Add a Required Test Waiver*.
5. Click **Submit**. The Edit Waiver drawer closes.

How to Delete a Required Test Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Required Tests section, click the **Pencil** icon next to the required test for which you want to delete a waiver. The Edit Waiver drawer opens.
4. Click **Delete**.
5. Click **Confirm Delete**. The Edit Waiver drawer closes.

How to Add a Subject Group Waiver

The Graduation Progress page displays the student's four-year graduation plan, any post-secondary plans, and the progress of each of those plans.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Subject Groups section, click the **Plus (+)** button next to the subject group for which you want to add a waiver. The Add Waiver drawer opens.
4. Use the following table to enter information in the fields:

Field	**Description**
Graduation Plan	The name of the graduation plan.
Subject Group	The name of the subject group.
Path to Node	The location of the subject group within the subject group list.
Waiver Type	Choose a waiver type from the pop-up menu.
Waiver Reason	Choose a waiver reason from the pop-up menu.
Waiver Source	Choose a waiver source from the pop-up menu.
Elective Subject Group	Choose an elective subject group from the pop-up menu.

Waiver Date	Indicate the date the waiver is effective.
Credit Waived	Indicate the number of credits to waive.
Authorized By	Choose the name of the person authorizing the waiver from the pop-up menu.

5. Click **Submit**. The Add Waiver drawer closes.

How to Edit a Subject Group Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Subject Groups section, click the **Pencil** icon next to the subject group for which you want to edit a waiver. The Edit Waiver drawer opens.
4. Edit as needed. For detailed field descriptions, see *How to Add a Waiver*.
5. Click **Submit**. The Edit Waiver drawer closes.

How to Delete a Subject Group Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Subject Groups section, click the **Pencil** icon next to the subject group for which you want to delete a waiver. The Edit Waiver drawer opens.
4. Click **Delete**.
5. Click **Confirm Delete**. The Edit Waiver drawer closes.

Once graduation planner is set up, you can then begin working with groups of students managing graduation plans and generating graduation progress reports and summaries.

Graduation Plans

Using the group Graduation Plan Selection page, you can manage graduation plans for a selection of students.

How to Select a Graduation Plan

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Plan Selection**. The Graduation Plan Selection page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Action to Take	Select the **Add the selected plans** option.
Graduation Contracts	In the list box on the left, click the name or the specific version of the graduation contract you want to select. The selected graduation contract appears in the list box on the right. To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button. If selecting multiple graduation contracts, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page. **Note:** If the name is selected instead of a specific version, the student will be assigned the version of the plan that matches their **Year Entering Graduation Plan** setting on the Graduation Plan Selection student page.
Post-Secondary Preparation Plans	In the list box on the left, click the name or the specific version of the post-secondary preparation plan you want to select. The

	selected post-secondary preparation plan appears in the list box on the right. To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button. If selecting multiple post-secondary preparation plans, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page. **Note:** If the name is selected instead of a specific version, the student will be assigned the version of the plan that matches their **Year Entering Post-Secondary Preparation Plans** setting on the Graduation Plan Selection student page.

5. Click **Submit**. The Changes Recorded page appears.

How to Replace a Graduation Plan

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Plan Selection**. The Graduation Plan Selection page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Action to Take	Select the **Replace all student selections with the versions below** option.

Graduation Contracts	In the list box on the left, click the name of the graduation contract you want to select. The selected graduation contract appears in the list box on the right. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.
Post-Secondary Preparation Plans	In the list box on the left, click the name of the post-secondary preparation plan you want to assign to the student. The selected post-secondary preparation plan appears in the list box on the right. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.

5. Click **Submit**. The Changes Recorded page appears.

How to Remove a Graduation Plan

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Plan Selection**. The Graduation Plan Selection page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Action to Take	Select the **Remove the selected plans** option.

Graduation Contracts	To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button. **Note:** If the name is selected instead of a specific version, the student will be removed from all versions of the plan.
Post-Secondary Preparation Plans	To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button. **Note:** If the name is selected instead of a specific version, the student will be removed from all versions of the plan.

5. Click **Submit**. The Changes Recorded page appears.

Graduation Progress Reports

Use the Graduation Progress Report to creates a printable graduation progress report for the selected students in their selected plans.

Warning: This report may adversely impact the performance of the system if run for too large a selection of students. Plan to run this report at off-peak times, or check with your system administrator prior to running.

Note: Due to browser differences, some browsers may fail to properly print this report. The fully supported browsers for this report are Internet Explorer 6.0+ on Windows, Safari 2.0+ on OS X, and Firefox 3.0+ on all platforms.

How to View the Graduation Progress Report

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Progress Report**. The Graduation Progress Report Parameters page appears.

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Students	The current selection of students.
Include page for students with no plan	Select the appropriate option: • **Skip students with no plan** • **Include all students**

5. Click **Submit**. The Graduation Progress Report page displays the following information for each student:

Field	Description
[Student Name]	The student's name.
[Student Number]	The student's number.
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens. 2. Review information. 3. Click **Close**.
Required Tests	
Test Name	The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc. Click to view detailed information.

Action	To view a waiver for a required test: 1. Click the **Notebook** icon. The View Waiver drawer opens and displays the following information: • **Test Name** • **Waiver Type** • **Waiver Reason** • **Waiver Source** • **Waiver Date** • **Authorized By** 2. Click **Close**. The View Waiver drawer closes. **Note:** The **Notebook** icon only appears if the **Allow Waiver** checkbox on the Edit Graduation Plan Test Requirements page has been enabled and a waiver has been added for the subject group.
Attempts	The number of times the student has taken the required test.
Completed	Indicates whether the student has passed, failed, waived, or has not taken the required test.
Subject Groups	
Subject Group	The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information: 1. Click the name of a subject group. The [Subject Group] drawer opens. 2. Review information. 3. Click **Close**.
[Waiver]	To view a waiver for a subject group: 1. Click the **Notebook** icon. The View Waiver drawer opens and displays the following information: • **Graduation Plan** • **Subject Group** • **Path to Node**

	• **Waiver Type** • **Waiver Reason** • **Waiver Source** • **Elective Subject Group** • **Waiver Date** • **Credit Waived** • **Authorized By** 2. Click **Close**. The View Waiver drawer closes. **Note:** The **Notebook** icon only appears if the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled and a waiver has been added for the subject group.
Earned	The total number (and individual number) of credits for courses within the subject group that the student has earned.
Enrolled	The total number of courses within the subject group that the student is currently enrolled in.
Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.
Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: • Dark green indicates completed credits. • Green indicates current enrollments. • Blue indicates waived credits.

	• Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

6. To print the report:

   Note: Instructional text that appears on the page will not be sent to the printer. When printing, each student's Graduation Progress Report will be printed on a separate page.

   - Turn on printing of "backgrounds" in your printer settings. Shading and colorations in this report are all "backgrounds" and not printing backgrounds will generally lead to illegible printouts.
   - Turn off printing of "header" information in your browser settings. If this is not off, each page printed will include (depending on browser) the URL of this page, a page number, and a time stamp. These are generally not desired for this report.
   - Use your browser's "Print Preview" feature to confirm that the output is correct prior to sending to the printer. You may adjust text size using the text font size controls of your browser. You may also control landscape/portrait printing via your browser settings. Doing so may prevent table cells from spanning page breaks and instances where the report appears too small in the final output.
   - Use your browser's "Print" feature to print the report.

Graduation Progress Report Data Capture

Use the Graduation Progress Report Data Capture function to store graduation plan progress data for future reporting.

Warning: This report may adversely impact the performance of the system if run for a large selection of students. To offset the impact on performance, check with your system administrator prior to running the report or run the report at an off-peak time.

How to Run the Graduation Progress Report Data Capture Function

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.

2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Progress Report Data Capture**. The Graduation Progress Report Data Capture Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Submit**. A confirmation message appears.

Graduation Progress Summary

Use Graduation Progress Summary to view a summary of graduation plan progress against specified requirements of a user-selected plan.

How to View the Graduation Progress Summary

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Progress Summary**. The Graduation Progress Summary Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Students	The current selection of students.
Plan Version to Display	Click the name of the graduation plan for which you want to view a summary. The selected graduation plan appears in the Columns to Display the list box on the left.

Columns to Display	Click the graduation plan, subject groups, and/or child subject groups you want to appear in the summary. The selected items appear in the list box on the right. Use the up and down arrows to indicate the order in which you want the items to appear in the summary. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.

5. Click **Submit**. The Graduation Progress Summary page displays graduation plan information for student.

PowerTeacher

Once graduation planner is set up, teachers can then begin working with students generating graduation progress summaries.

Graduation Plan Progress

The Graduation Progress page displays the student's four-year graduation plan, any post-secondary plans, and the progress of each of those plans. Progress is indicated by the use of a color-coded bar. Dark green indicates earned credits; light green indicates currently enrolled credits; and yellow indicates requested/planned credits. A green checkmark indicates that a requirement has been completely satisfied.

How to View Graduation Plan Progress

Use this procedure to view course requirements and completion status.

1. On the Student Information page, choose **Graduation Plan Progress** from the **Select screens** pop-up menu. The Graduation Progress page displays the following information for each plan:

Field	Description
[Student Name]	The student's name.
[Student Number]	The student's number.
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens. 2. Review information. 3. Click **Close**.
Required Tests	
Test Name	The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc. Click to view detailed information.

Action	To view a waiver for a required test: 1. Click the **Notebook** icon. The View Waiver drawer opens and displays the following information: • **Test Name** • **Waiver Type** • **Waiver Reason** • **Waiver Source** • **Waiver Date** • **Authorized By** 2. Click **Close**. The View Waiver drawer closes. **Note:** The **Notebook** icon only appears if the **Allow Waiver** checkbox on the Edit Graduation Plan Test Requirements page has been enabled and a waiver has been added for the subject group.
Attempts	The number of times the student has taken the required test.
Completed	Indicates whether the student has passed, failed, waived, or has not taken the required test.
Subject Groups	
Subject Group	The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information: 1. Click the name of a subject group. The [Subject Group] drawer opens. 2. Review information. 3. Click **Close**.
[Waiver]	To view a waiver for a subject group: 1. Click the **Notebook** icon. The View Waiver drawer opens and displays the following information: • **Graduation Plan** • **Subject Group** • **Path to Node**

	Waiver Type **Waiver Reason** **Waiver Source** **Elective Subject Group** **Waiver Date** **Credit Waived** **Authorized By** 2. Click **Close**. The View Waiver drawer closes. **Note:** The **Notebook** icon only appears if the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled and a waiver has been added for the subject group.
Earned	The total number (and individual number) of credits for courses within the subject group that the student has earned.
Enrolled	The total number of courses within the subject group that the student is currently enrolled in.
Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.
Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: - Dark green indicates completed credits. - Green indicates current enrollments. - Blue indicates waived credits.

	• Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

PowerSchool Parent Portal

Once graduation planner is set up, parents can then begin monitoring their student's graduation plan progress and managing any post-secondary plans.

Graduation Plan Progress

The Graduation Progress page displays the student's four-year graduation plan, any post-secondary plans, and the progress of each of those plans. Progress is indicated by the use of a color-coded bar. Dark green indicates earned credits; light green indicates currently enrolled credits; and yellow indicates requested/planned credits. A green checkmark indicates that a requirement has been completely satisfied.

Note: This procedure is only available if enabled by your school.

How to View Graduation Plan Progress

Use this procedure to view course requirements and completion status.

1. On the main menu, do one of the following:
    - Click **Grades History**. The Grade History page appears.
    - Click **Class Registration** and then **View future course requests**. The [Scheduling Year] Course Requests page.
2. Click **View Graduation Progress**. The Graduation Progress page displays the following information for each plan:

Field	Description
Select Post Secondary Plans	To select a post-secondary plan: 1. Click **Select Post-Secondary Plans**. The Post-Secondary Plans Selection page appears. 2. In the first box, click the name of the post-secondary plan you want to select. The name appears in the second box. 3. Repeat Step 2 for each post-secondary plan you want to select. 4. Click **Submit**. The Graduation Progress page appears. To remove a post-secondary plan:

<table>
<tr><td></td><td>Click Select Post-Secondary Plans. The Post-Secondary Plans Selection page appears.
In the box on the right, click the Minus (-) button next to the name of the post-secondary plan you want to delete. The post-secondary plan no longer appears.
Repeat Step 2 for each post-secondary plan you want to delete.
Click Submit. The Graduation Progress page appears.</td></tr>
<tr><td>Graduation Plan</td><td>The name of the graduation plan. To view additional information:
Click the name of the graduation plan. The [Graduation Plan] drawer opens.
Review information.
Click Close.</td></tr>
<tr><td colspan="2">Required Tests</td></tr>
<tr><td>Test Name</td><td>The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc. Click to view detailed information.</td></tr>
<tr><td>Action</td><td>To view a waiver for a required test:
Click the Notebook icon. The View Waiver drawer opens and displays the following information:
Test Name
Waiver Type
Waiver Reason
Waiver Source
Waiver Date
Authorized By
Click Close. The View Waiver drawer closes.
Note: The Notebook icon only appears if the Allow Waiver checkbox on the Edit Graduation Plan Test Requirements page has been enabled and a waiver has been added for the subject group.</td></tr>
<tr><td>Attempts</td><td>The number of times the student has taken the required test.</td></tr>
</table>

<table>
<tr><td>Completed</td><td>Indicates whether the student has passed, failed, waived, or has not taken the required test.</td></tr>
<tr><td colspan="2">Subject Groups</td></tr>
<tr><td>Subject Group</td><td>The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information:

1. Click the name of a subject group. The [Subject Group] drawer opens.
2. Review information.
3. Click Close.</td></tr>
<tr><td>[Waiver]</td><td>To view a waiver for a subject group:

1. Click the Notebook icon. The View Waiver drawer opens and displays the following information:
• Graduation Plan
• Subject Group
• Path to Node
• Waiver Type
• Waiver Reason
• Waiver Source
• Elective Subject Group
• Waiver Date
• Credit Waived
• Authorized By
2. Click Close. The View Waiver drawer closes.

Note: The Notebook icon only appears if the Allow Waiver checkbox on the Edit Graduation Plan Requirement page has been enabled and a waiver has been added for the subject group.</td></tr>
<tr><td>Earned</td><td>The total number (and individual number) of credits for courses within the subject group that the student has earned.</td></tr>
<tr><td>Enrolled</td><td>The total number of courses within the subject group that the student is currently enrolled in.</td></tr>
</table>

Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.
Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: • Dark green indicates completed credits. • Green indicates current enrollments. • Blue indicates waived credits. • Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

Post-Secondary Graduation Plans

Post-secondary preparation plans define requirements that must be fulfilled in order to attend a post-secondary institution, such as a state college or university. Using the post-secondary plans selector, you can select the applicable post-secondary plans in order to monitor your student's progress and ensure that they achieve their goals.

Note: This procedure is only available if enabled by your school.

How to Select a Post-Secondary Plan

Use this procedure to select a post-secondary plan.

1. On the main menu, do one of the following:
    - Click **Grades History**. The Grade History page appears.

- Click **Class Registration** and then **View future course requests**. The [Scheduling Year] Course Requests page.

2. Click **View Graduation Progress**. The Graduation Progress appears.
3. Click **Select Post-Secondary Plans**. The Post-Secondary Plans Selection page appears.
4. In the first box, click the name of the post-secondary plan you want to select. The name appears in the second box.
5. Repeat Step 4 for each post-secondary plan you want to select.
6. Click **Submit**. The Graduation Progress page appears.

How to Remove a Post-Secondary Plan

Use this procedure to remove a post-secondary plan.

1. On the main menu, do one of the following:
   - Click **Grades History**. The Grade History page appears.
   - Click **Class Registration** and then **View future course requests**. The [Scheduling Year] Course Requests page.
2. Click **View Graduation Progress**. The Graduation Progress appears.
3. Click **Select Post-Secondary Plans**. The Post-Secondary Plans Selection page appears.
4. In the box on the right, click the **Minus (-)** button next to the name of the post-secondary plan you want to delete. The post-secondary plan no longer appears.
5. Repeat Step 4 for each post-secondary plan you want to delete.
6. Click **Submit**. The Graduation Progress page appears.

Health Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

With the introduction of Health Management, PowerSchool now provides a tool to assist your school district with capturing, managing, and reporting student health-related information. Using Heath Management, you can set up immunizations, screenings, and grade level entry certifications based on your district's needs. Once set up, you can then record student immunization information, screening information, and grade level entry certifications.

State Reporting

For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. If there is no state-specific setup specified in your state reporting setup guide, you do not have PowerSchool state-required Immunization reports that are supported at this time. Therefore, no state-specific setup considerations need to be taken into account. You may set up Health Management as needed by your district.

Note: Topics are ordered by how they appear in the *Health Management User Guide*.

- *Set Page-Level Permissions*
- *Import Immunization Data*
- *Set Up Immunizations*
- *Set Up Vaccines*
- *Set Up Exemption Types*
- *Set Up Certificate Types*
- *Set Up Screenings*
- *Set Up Office Visits*
- *Set Up Grade Level Entry Certifications*
- *Set Up Certification Status Values*
- *Set Up Miscellaneous*
- *Enter Immunizations*
- *Enter Screenings*
- *Enter Waivers*
- *Enter Office Visits*
- *Enter Certifications*
- *Search for Students by Immunization Compliance*
- *Work with Student Groups*
- *Health Data Grid*

Setup

Set Page-Level Permissions

Security for the Health Management setup pages is controlled through page-level permissions. Permissions for the Certifications, Immunizations, Office Visits, and Screenings tabs are controlled independently of one another. For each page, enable page permissions access, set page-level permissions, and then disable page permissions access:

- Start Page > Special Functions under Functions in the main menu > Importing & Exporting > Quick Import
- Start Page > Special Functions under Functions in the main menu > Importing & Exporting > Quick Import > Submit
- Start Page > District under Setup in the main menu > Health > Immunizations
- Start Page > District under Setup in the main menu > Health > Office Visits
- Start Page > District under Setup in the main menu > Health > Screenings
- Start Page > District under Setup in the main menu > Health > Grade Level Entry Certifications

Note: Page-level permissions should not be used to control access for the student Health Management pages. Security for the student Health Management pages is controlled through group security permissions. For more information, see *Set Group Security Permissions*.

Note: For detailed information, see *Page-Level Permissions* in the *Security Permissions* section.

Set Group Security Permissions

Security for the Health Management student pages is controlled through group security permissions. Permissions for the Certifications, Immunizations, Office Visits, and Screenings tabs are controlled independently of one another. When setting up group security permissions using the Edit Group page, at a minimum, you need to define the following for users in a selected group:

- Use the **Default Access** pop-up menu to indicate the level of permission used as the default permissions.
- Use the **Health Certification** pop-up menu to indicate the level of permission for the Grade Level Entry Certifications tab.
- Use the **Health Immunization** pop-up menu to indicate the level of permission for the Immunizations tab.

- Use the **Health Office Visits** pop-up menu to indicate the level of permission for the Office Visits tab.
- Use the **Health Screening** pop-up menu to indicate the level of permission for the Certifications tab.
- Select the **Accessible Student Screens Health** checkbox to provide access to the student Health Management pages.

Note: For detailed information, see *How to Edit Security Groups* in the *Group Security Permissions* section.

Import Immunization Data

During the initial setup of Health Management, use the Quick Import function to transfer immunization data into PowerSchool. When importing immunization data, you need to create an ASCII text file. The field delimiter must be tab and the row delimiter must be carriage return. Other delimiters are not supported. The import file must include the following required fields:

Student_Number
WhenInput
WhoInput
(VaccineCode)_(DoseNumber)_Date
(VaccineCode)_(DoseNumber)_CertificateType

The import spreadsheet may also include the following optional fields:

(VaccineCode)_ExemptionType
(VaccineCode)_CompliancyStatus

The (DoseNumber) must start at 1. If there is more than one dose, the (DoseNumber) that follows must be sequential. For example:

Student_Number
WhenInput
WhoInput
Polio_ExemptionType
Polio_CompliancyStatus
Polio_1_Date
Polio_2_Date
Polio_3_Date
Polio_4_Date
Polio_1_CertificateType
Polio_2_CertificateType

Polio_3_CertificateType
Polio_4_CertificateType

When using the Quick Import function, you must choose **Immunization** from the **Table** pop-up menu. For detailed information about using the Quick Import function, see *Quick Import*. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide.

Set Up Immunizations

Using the Health Immunization tab, you can set up vaccines, exemption types, and certificate types for Health Management.

Set Up Vaccines

Use the following procedures to define vaccines for which you want to record immunization information. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. Defined values appear on the student Health page's Immunization tab. For more information, see *Enter Student Immunization Information*.

How to Add a Vaccine

Use this procedure to add as many vaccines as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Vaccines**. The Vaccines page appears.
5. Click **+ Add**. The Add New Vaccine dialog appears.
6. Use the following table to enter information in the fields:

Field	Description
Vaccine Name	Enter the vaccine name.
Vaccine Code	Enter the vaccine code.

State Report Name	Do one of the following: • Enter the name specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined name. • Leave this field blank.
State Report Code	Do one of the following: • Enter the code specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined code. • Leave this field blank.
Number of Doses	Enter the number of required doses.
Description	Enter any additional comments pertaining to the vaccine.
This vaccine is optional	By default the checkbox is not selected indicating the vaccine is mandatory. Select the checkbox to indicate the vaccine is optional.
Rules Engine	The option to use the Rules Engine varies by state. If your state guidelines indicate that a visual notification of compliance and status is required, then this section is visible. By binding a vaccine to a rule, the Rules Engine can compare student immunization data against state-specific guidelines in order to identify students' vaccine and/or dose compliancy. 1. To bind a vaccine, choose a rule from the **Bind vaccine to a rule** pop-up menu. A vaccine may be bound to only one rule. Once the rule is bound to a vaccine, it no longer appears in the **Bind vaccine to a rule** pop-up menu. **Note:** To unbind a vaccine, select the **Unbind rule** checkbox. By selecting this option, all existing compliancy values for the vaccine are reset to the default value of compliant and rules assessment is reset to manually assess compliance at vaccine level.

	2. If you bind a vaccine to a rule, indicate the method by which you want the vaccine assessed by selecting one of the following: • To automatically assess the vaccine, select the **Use Rules Engine to assess compliance** option. By selecting this option, vaccine compliance is automatically assessed at the dose level. • To manually assess the vaccine, select the **Manually assess compliance at vaccine level** option. By selecting this option, vaccine compliance can be manually assessed at the vaccine level. **Note:** If a vaccine that is set to use Rules Engine to assess compliance is then set to manually assess compliance, all existing compliancy values for the vaccine are reset to the default value of compliant. **Note:** For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide.

7. Click **Update**.
8. Repeat Step 5 through Step 7 for each vaccine you want to add.
9. To require users to certify that the immunization data entered is accurate, select the **Require users to certify transcription accuracy** checkbox. Otherwise, leave it blank.
10. Click **Submit**.

How to Edit a Vaccine

Use this procedure to edit vaccine details.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Vaccines**. The Vaccines page appears.
5. Click the vaccine you want to edit. The Edit Vaccine dialog appears.
6. Edit the information as needed. For field descriptions, see *How to Add a Vaccine*.
7. Click **Update**.

8. Repeat Step 5 through Step 7 for each vaccine you want to edit.
9. To require users to certify that the immunization data entered is accurate, select the **Require users to certify transcription accuracy** checkbox. Otherwise, leave it blank.
10. Click **Submit**.

How to Delete a Vaccine

Use this procedure to delete a vaccine that may have been created in error or that is no longer in use.

Note: If a vaccine is associated to a student, it cannot be deleted. First remove the dose dates for the vaccine from all students and then the vaccine may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Vaccines**. The Vaccines page appears.
5. Click the **Minus (-)** button next to the vaccine you want to remove. The vaccine appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

6. Repeat Step 5 for each vaccine you want to delete.
7. Click **Submit**.

How to Change the Display Order of Vaccines

Use this procedure to change the order in which the vaccines you created appear on the Immunizations tab of the student Health page.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Vaccines**. The Vaccines page appears.
5. Click and hold the **Horizontal Three-Line** icon and drag up or down to change the display order of the vaccines.
6. Click **Submit**. The new display order is saved, and the updated order appears on the student Health page's Immunizations tab.

Set Up Exemption Types

Use the following procedures to define exemption types, which may be used to indicate the reason an individual is exempt from vaccination. For state-specific information, see PowerSchool's recommended state-specific setup of health and immunizations settings available on PowerSource in your state reporting setup guide. Defined values appear in the **Exemption Type** pop-up menu on the student Health page's Immunization tab. For more information, see *Enter Student Immunization Information*.

How to Add an Exemption Type

Use this procedure to add as many exemption types as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Exemption Types**. The Exemption Types page appears.

   Note: Click the **Name** or **Code** column to sort by that column.

5. Click **+ Add**. The Add New Exemption Type dialog appears.
6. Use the following table to enter information in the fields:

Field	Description
Exemption Name	Enter the exemption type name.
Exemption Code	Enter the exemption type code.
State Report Name	Do one of the following: • Enter the name specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined name. • Leave this field blank.

State Report Code	Do one of the following: • Enter the code specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined code. • Leave this field blank.

7. Click **Update**.
8. Repeat Step 5 through Step 7 for each exemption type you want to add.
9. Click **Submit**.

How to Edit an Exemption Type

Use this procedure to edit an exemption type.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Exemption Types**. The Exemption Types page appears.

   Note: Click the **Name** or **Code** column to sort by that column.

5. Click the **Pencil** icon next to the exemption type you want to edit. The Edit Exemption Type dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

6. Edit the information as needed. For field descriptions, see *How to Add an Exemption Type*.
7. Click **Update**.
8. Repeat Step 5 through Step 7 for each exemption type you want to edit.
9. Click **Submit**.

How to Delete an Exemption Type

Use this procedure to delete an exemption type that may have been created in error or that is no longer in use.

Note: If an exemption type is associated to a student, it cannot be deleted. First remove the exemption type from all students and then it may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Exemption Types**. The Exemption Types page appears.
5. Click the **Minus (-)** button next to the exemption type you want to remove. The exemption type appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

6. Repeat Step 5 for each exemption type you want to delete.
7. Click **Submit**.

Set Up Certificate Types

Use the following procedures to define certificates types, which may be used to indicate the source of information from which immunization information was obtained. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. Defined values appear in the **Certificate Type** pop-up menu on the student Health page's Immunization tab. For more information, see *Enter Student Immunization Information*.

How to Add a Certificate Type

Use this procedure to add as many immunization certificate types as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Certificate Types**. The Certificate Types page appears.

   Note: Click the **Name**, **Code**, or **Default** column to sort by that column.

5. Click **+ Add**. The Add New Certificate Type dialog appears.
6. Use the following table to enter information in the fields:

Field	Description
Certificate Name	Enter the certificate type name.
Certificate Code	Enter the certificate type code.
State Report Name	Do one of the following: • Enter the name specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined name. • Leave this field blank.
State Report Code	Do one of the following: • Enter the code specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined code. • Leave this field blank.
Default Certificate	Select the checkbox to specify this certificate type as the default certificate type.

7. Click **Update**.
8. Repeat Step 5 through Step 7 for each certificate type you want to add.
9. Click **Submit**.

How to Edit a Certificate Type

Use this procedure to edit a certificate type.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Certificate Types**. The Certificate Types page appears.

Note: Click the **Name**, **Code**, or **Default** column to sort by that column.

5. Click the **Pencil** icon next to the certificate type you want to edit. The Edit Certificate Type dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

6. Edit the information as needed. For field descriptions, see *How to Add a Certificate Type*.
7. Click **Update**.
8. Repeat Step 5 through Step 7 for each certificate type you want to edit.
9. Click **Submit**.

How to Delete a Certificate Type

Use this procedure to delete a certificate type that may have been created in error or that is no longer in use.

Note: If a certificate type is associated to a student, it cannot be deleted. First remove the certificate type from all students and then it may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **Certificate Types**. The Certificate Types page appears.
5. Click the **Minus (-)** button next to the certificate type you want to remove. The certificate type appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

6. Repeat Step 5 for each certificate type you want to delete.
7. Click **Submit**.

Set Up Screenings

There are six screenings for which you can set up student entry field display values: Hearing, Oral Health, Scoliosis, Tuberculosis, Vision and Color, and Vital Signs/Biometrics. Each screening includes a number of student entry fields for which the following display values may be defined: Display Value, State Report Name, and State Report Code. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. Defined values appear on the Add Screening and Edit Screening dialogs on the student Health page's Screenings tab. For more information, see *Enter Student Screening Records*.

How to Add a Screening Student Entry Field Display Value

Use this procedure to add as many display values to each screening student entry field as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Screenings** tab.
4. On the Screenings tab, click the screening type for which you want to add a display value. Student entry fields for the selected screening appear.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

5. Click **+ Add** next to the student entry field for which you want to add a display value:

Field	Description
Hearing	• Screening Provider Type • Left Ear Test Result • Right Ear Test Result • Test Type • Screening Outcome • Hearing Waiver Reason
Oral Health	• Screening Provider Type • Treatment Urgency • Screening Outcome • Oral Health Waiver Reason
Scoliosis	• Screening Provider Type • X-Ray Film Impression • Screening Outcome

	• Scoliosis Waiver Reason
Tuberculosis	• Screening Provider Type • Chest X-Ray Impression • Skin Test Result • Skin Test Type • Screening Outcome • Tuberculosis Waiver Reason
Vision and Color	• Screening Provider Type • Color Blind Test Result • Left Eye Test Result • Right Eye Test Result • Screening Outcome • Vision Waiver Reason
Vital Signs/Biometrics	• Screening Provider Type • Weight Status • Screening Outcome • Vital Signs/Biometrics Waiver Reason

6. On the Add dialog for the selected student entry field, enter information in the fields:

Field	**Description**
Display Value	Enter the name of the display value.
State Report Name	Do one of the following: • Enter the name specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined name. • Leave this field blank.

State Report Code	Do one of the following: • Enter the code specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined code. • Leave this field blank.

7. Click **Add**.
8. Repeat Step 5 through Step 7 for each student entry field display value you want to add.
9. Click **Submit**.

How to Edit a Screening Student Entry Field Display Value

Use this procedure to edit a screening student entry field display value.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Screenings** tab.
4. On the Screenings tab, click the screening type for which you want to edit a display value. Student entry fields for the selected screening appear.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

5. Use the following table to enter information in the fields:

Field	**Description**
Active	Do one of the following: • Leave the checkbox selected to indicate the student entry field display value is active. When selected, the student entry field display value will appear on the Student Health pages. • Deselect the checkbox to indicate the student entry field display value is not active. When deselected, the student

	entry field display value will no longer appear on the Student Health pages. **Note:** By default, when a student entry field display value is added it is active.
Default	Do one of the following: • Select the checkbox of the student entry field display value you want to display as the default value on the Student Health pages. • Deselect the checkboxes of the student entry field display value you do not want to display as the default value on the Student Health pages. **Note:** Only one active student entry field display value may be selected as the default value. If the default value is made inactive, it no longer appears as the default.
Order	Use the up and down arrows to modify the order of the student entry field display values as they appear on the Student Health pages.

6. Click the **Pencil** icon next to the student entry field display value you want to edit. The Edit dialog for the selected student entry field appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

7. Edit the information as needed. For field descriptions, see *How to Add a Screening Student Entry Field Display Value*.
8. Click **Update**.
9. Repeat Step 5 through Step 7 for each student entry field display value you want to edit.
10. Click **Submit**.

How to Delete a Screening Student Entry Field Display Value

Use this procedure to delete a display value for a screening student entry field that may have been created in error or that is no longer in use.

Note: If a screening display value is associated to a student, it cannot be deleted. First remove the screening display value from all students and then it may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Screenings** tab.
4. On the Screenings tab, click the screening type for which you want to delete a display value. Student entry fields for the selected screening appear.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

5. Click the **Minus (-)** button next to the student entry field display you want to remove. The student entry field display appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

6. Repeat Step 5 for each student entry field display value you want to delete.
7. Click **Submit**.

Set Up Office Visits

When setting up offices visits, you can define display values for the following three student entry fields: Office Visit Type, Office Visit Provider Type, and Office Visit Outcome. For each student entry field, the following values may be defined: Display Value, State Report Name, and State Report Code. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. Defined values appear on the Add Office Visit and Edit Office Visit dialogs on the student Health page's Office Visits tab. For more information, see *Enter Student Office Visits*.

How to Add an Office Visit Student Entry Field Display Value

Use this procedure to add as many display values to each office visit student entry field as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Office Visits** tab.

Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

4. On the Office Visits tab, click **+ Add** next to the student entry field for which you want to add a display value**:**
    - **Office Visit Type**
    - **Office Visit Type Provider**
    - **Office Visit Outcome**
5. On the Add dialog for the selected student entry field, enter information in the fields:

Field	Description
Display Value	Enter the name of the office visit type, office visit provider type, or office visit outcome.
State Report Name	Do one of the following: • Enter the name specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined name. • Leave this field blank.
State Report Code	Do one of the following: • Enter the code specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined code. • Leave this field blank.

6. Click **Add**.
7. Repeat Step 4 through Step 6 for each student entry field display value you want to add.
8. Click **Submit**.

How to Edit an Office Visit Student Entry Field Display Value

Use this procedure to edit an office visit student entry field display value.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Office Visits** tab.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

4. Use the following table to enter information in the fields:

Field	Description
Active	Do one of the following: • Leave the checkbox selected to indicate the student entry field display value is active. When selected, the student entry field display value will appear on the Student Health pages. • Deselect the checkbox to indicate the student entry field display value is not active. When deselected, the student entry field display value will no longer appear on the Student Health pages. **Note:** By default, when a student entry field display value is added it is active.
Default	Do one of the following: • Select the checkbox of the student entry field display value you want to display as the default value on the Student Health pages. • Deselect the checkboxes of the student entry field display value you do not want to display as the default value on the Student Health pages. **Note:** Only one active student entry field display value may be selected as the default value. If the default value is made inactive, it no longer appears as the default.

Order	Use the up and down arrows to modify the order of the student entry field display values as they appear on the Student Health pages.

5. Click the **Pencil** icon next to the student entry field display value you want to edit. The Edit dialog for the selected student entry field appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

6. Edit the information as needed. For field descriptions, see *How to Add an Office Visit Student Entry Field Display Value*.
7. Click **Update**.
8. Repeat Step 4 through Step 6 for each student entry field display value you want to edit.
9. Click **Submit**.

How to Delete an Office Visit Student Entry Field Display Value

Use this procedure to delete a display value for an office visit student entry field that may have been created in error or that is no longer in use.

Note: If an office visit display value is associated to a student, it cannot be deleted. First remove the office visit display value from all students and then it may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Office Visits** tab.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

4. On the Office Visits tab, click the **Minus (-)** button next to the student entry field display value you want to remove. The student entry field display value appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

5. Repeat Step 4 for each student entry field display value you want to delete.
6. Click **Submit**.

Set Up Grade Level Entry Certifications

Depending on the state, one or many grade level entry certifications must occur for students in a district to ensure that health-related requirements have been met prior to entry into a given grade level. Use the following procedures to define grade levels that require entry certification. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. Defined values appear in the **+ Add Grade Level** pop-up menu on the student Health page's Grade Level Entry Certifications tab. For more information, see *Enter Student Grade Level Entry Certification Records*.

Note: This topic covers how to add, edit, and delete grade level entry certifications. To add, edit, and delete certification status values, see *Set Up Certification Status Values*.

How to Add a Grade Level Entry Certification

Use this procedure to add as many grade level entry certifications as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Grade Level Entry Certifications** tab.

   Note: Click the **Grade Level** or **Description** column to sort by that column.

4. On the Grade Level Entry Certifications tab under Grade Level Entry Certifications, click **+ Add**. The Add Grade Level Entry Certification dialog appears.
5. Use the following table to enter information in the fields:

Field	Description
Grade Level	Choose a grade level from the pop-up menu.
Description	Enter any additional comments pertaining to the grade level entry certification.

6. Click **Add**.
7. Repeat Step 4 through Step 6 for each grade level entry certification you want to add.
8. Click **Submit**.

How to Edit a Grade Level Entry Certification

Use this procedure to edit a grade level entry certification.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Grade Level Entry Certifications** tab.

   Note: Click the **Grade Level** or **Description** column to sort by that column.

4. Use the following table to enter information in the fields:

Field	Description
Active	Do one of the following: • Leave the checkbox selected to indicate the student entry field display value is active. When selected, the student entry field display value will appear on the Student Health pages. • Deselect the checkbox to indicate the student entry field display value is not active. When deselected, the student entry field display value will no longer appear on the Student Health pages. **Note:** By default, when a student entry field display value is added it is active.
Order	Use the up and down arrows to modify the order of the student entry field display values as they appear on the Student Health pages.

5. Click the **Pencil** icon next to the grade level entry certification you want to edit. The Edit Grade Level Entry Certification dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

6. Edit the information as needed. For field descriptions, see *How to Add a Grade Level Entry Certification*.
7. Click **Update**.
8. Repeat Step 4 through Step 6 for each grade level entry certification you want to edit.
9. Click **Submit**.

How to Delete a Grade Level Entry Certification

Use this procedure to delete a grade level entry certification that may have been created in error or that is no longer in use.

Note: If a grade level entry certification is associated to a student, it cannot be deleted. First remove the grade level entry certification from all students and then it may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Grade Level Entry Certifications** tab.

   Note: Click the **Grade Level** or **Description** column to sort by that column.

4. On the Grade Level Entry Certifications tab under Grade Level Entry Certifications, click the **Minus (-)** button next to the grade level entry certification you want to remove. The grade level entry certification appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

5. Repeat Step 4 for each grade level entry certification you want to delete.
6. Click **Submit**.

Set Up Certification Status Values

If one or many grade level entry certifications have been defined, use the following procedures to define status values that may be used to indicate the progress of a grade level entry certification. For state-specific information, see PowerSchool's recommended state-specific setup of Health Management settings available on PowerSource in your state reporting setup guide. Defined values appear in the **Certification Status** pop-up menu. For more information, see *Enter Student Grade Level Entry Certification Records*.

Note: This topic covers how to add, edit, and delete certification status values. To add, edit, and delete grade level entry certifications, see *Set Up Grade Level Entry Certifications*.

How to Add a Certification Status Value

Use this procedure to add as many certification status values as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Grade Level Entry Certification** tab.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

4. On the Grade Level Entry Certifications tab under Certification Status Values, click **+ Add**. The Add Certification Status Value dialog appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Display Value	Enter the name of the certification status value.
State Report Name	Do one of the following: • Enter the name specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined name. • Leave this field blank.
State Report Code	Do one of the following: • Enter the code specified by your state; see your PowerSchool state reporting setup guide. • Enter a district-defined code. • Leave this field blank.

6. Click **Add**.
7. Repeat Step 4 through Step 6 for each certification status value you want to add.
8. Click **Submit**.

How to Edit a Certification Status Value

Use this procedure to edit a certification status value.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Grade Level Entry Certification** tab.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

4. On the Grade Level Entry Certifications tab under Certification Status Values, click the **Pencil** icon next to the certification status value you want to edit. The Edit Certification Status Value dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

5. Edit the information as needed. For field descriptions, see *How to Add a Certification Status Value*.
6. Click **Update**.
7. Repeat Step 4 through Step 6 for each certification status value you want to edit.
8. Click **Submit**.

How to Delete a Certification Status Value

Use this procedure to delete a certification status value that may have been created in error or that is no longer in use.

Note: If a certification status value is associated to a student, it cannot be deleted. First remove the certification status value from all students and then it may be deleted.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Grade Level Entry Certification** tab.

   Note: Click the **Display Value**, **State Code**, or **State Name** column to sort by that column.

4. On the Grade Level Entry Certifications tab under Certification Status Values, click the **Minus (-)** button next to the certification status value you want to remove. The certification status value appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

5. Repeat Step 4 for each certification status value you want to delete.
6. Click **Submit**.

Set Up Miscellaneous Health Settings

Using the Setup tab, you can set up miscellaneous settings for Health Management.

How to Set Up Miscellaneous Health Settings

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health**. The Health page appears.
3. Click the **Setup** tab.
4. Use the following table to enter information in the fields:

Field	Description
Display Office Visits and Screenings entered at other schools	Select the checkbox to display a student's screenings and office visits entered at a previous school when viewing the student's health records. Otherwise, leave the checkbox blank. By default, this setting is disabled.

5. Click **Submit**.

Student Entry

Enter Student Immunization Information

Using the Immunizations tab on the student Health page, you can enter immunization data for a student. The Immunizations tab accommodates an unlimited number of vaccines, quick data entry, and provides real-time dose date validation.

Note: Based on your group security permissions, you may be able to view only, or you may be able to view/modify. For more information, see *Set Group Security Permissions*.

How to View a Student's Vaccine Summary

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, hover over the vaccine name you want to view. The following information appears for the selected vaccine:
    - Vaccine Description
    - Vaccine Code
    - Number of Doses
    - Is Mandatory
    - Exemption Type
    - Out of Compliance
    - Comments

How to Enter a Student's Immunization Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, use the following table to enter information in the fields:

    Note: When entering information in a pop-up, you can press **Tab** to scroll through pop-up fields; tabbing from the last field saves and closes the pop-up; press **Esc** to cancel and close the pop-up and press **Return** (Mac) or **Enter** (Windows) to save and close the pop-up.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>[Compliance Message]</td><td>A message appears indicating the number of immunizations that are out of compliance, if any.</td></tr>
<tr><td>Vaccine</td><td>Click the name of the vaccine. The [Vaccine Name] pop-up appears.
Do one or more of the following:
If the vaccine is optional or if vaccine compliance is manually assessed at the vaccine level, select the Out of compliance checkbox to indicate the immunization is out of compliance. Alternatively, deselect the Out of compliance checkbox to indicate the immunization is in compliance.

Note: This checkbox does not appear if vaccine compliance is automatically assessed at the dose level. For more information, see Rules Engine.
Indicate the student is exempt from the immunization by choosing the appropriate Exemption Type from pop-up menu.
Enter additional information regarding the immunization in the Comment field.
Press Tab to save and close the pop-up.</td></tr>
<tr><td>Date each dose was given</td><td>Click the appropriate dose cell of the vaccine for which you want to enter information. A pop-up appears.
Enter the date the dose was administered or click the Calendar icon to select a date. Use the Arrow icons to select a different month.
Choose the appropriate Certificate Type from the pop-up menu.
Press Tab to save and close the pop-up and open the next does pop-up.</td></tr>
<tr><td>[Legend]</td><td>The following icons are used to provide visual indicators about information pertaining to a vaccine:</td></tr>
</table>

	• The **Stop Sign Exclamation Mark** icon indicates the student has not received the vaccination and therefore is out of compliance. • The **Triangle Exclamation Mark** icon indicates the student has not yet received the latest dose of a vaccination and therefore is out of compliance. **Note:** This icon may only appear if vaccine compliance is automatically assessed at the dose level. This icon does not appear if vaccine compliance is manually assessed at the vaccine level. For more information, see *Rules Engine*. • The **Square EX** icon indicates the student is exempt from being administered the vaccination. • The **Square OP** icon indicates the vaccination is optional.
Description of Change	Enter the reason for updating the student's immunization information.
View Change History	1. Click to view the student's immunization change history. The Change History dialog appears. 2. Do one or more of the following: • Click the arrow next to **the date** to expand the list. • Click the arrow again to condense the list. • Click **Expand All Items** to view all entries. • Click **Collapse All Items** to minimize all entries. 3. Click **X** to close the dialog.
[Confirmation]	Once you have completed entering a student's immunization information, you must select the checkbox attesting that all values you entered are accurate and reflective of the certificate data presented to you before you can submit the information. **Note:** If this checkbox does not appear, your district does not require it.

5. Click **Submit**.

How to Edit a Student's Immunization Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, edit the information as needed. For field descriptions, see *How to Enter a Student's Immunization Information*.
5. Click **Submit**.

How to View a Student's Immunization Information Change History

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Immunizations** tab, if needed.
4. On the Immunizations tab, click **View Change History**. The Change History dialog appears.
5. Do one of the following:
    - Click the arrow next to **the date** to expand the list.
    - Click the arrow again to condense the list.
    - Click **Expand All Items** to view all entries.
    - Click **Collapse All Items** to minimize all entries.
6. Click **X** to close the dialog.

Enter Student Screening Records

Using the Screenings tab on the student Health page, you can enter screening information for a student. The Screenings tab provides you with the ability to record an unlimited number of hearing, oral health, Scoliosis, Tuberculosis, vision and color, and vital signs/biometrics examinations. Additionally, a screening summary page provides quick access to historical screening information. This topic covers how to add, edit, and delete student screening records. To add, edit, and delete student screening waivers, see *Enter Student Screening Waivers*.

Note: Based on your group security permissions, you may be able to view only, view/modify, or view/modify/delete. For more information, see *Set Group Security Permissions*.

How to View a Student's Screening Summary

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab. The Screenings tab displays the following information:

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

Field	Description
Type	The type of screening that was administered: • Hearing Screening • Oral Health Screening • Scoliosis Screening • Tuberculosis Screening • Vision Screening • Vital Signs/Biometrics Screening Hover over the screening name to view the following information: • Screening Provider Name • Screening Provider Type • Grade Level • [Screening information]
Date	The date the screening was performed.
Outcome	The decision or action taken as a result of the screening.
Comment	Additional information regarding the screening.

How to Add a Hearing Screening Record

Use this procedure to enter hearing screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Screening** and choose **Hearing Screening**. The Add Hearing Screening dialog appears.
5. Use the following table to enter information in the Screening Details fields:

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening. **Note:** This setting is retained as you move through PowerSchool.
Screening Date	Enter the date the screening was performed or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External. **Note:** This setting is retained as you move through PowerSchool.
Grade Level	Use the pop-up menu to indicate the grade level the student was in when the screening was administered. **Note:** By default, the student's current grade level appears.

6. Use the following table to enter information in the Hearing Test fields:

Field	Description
Right Ear Test Result	Use the pop-up menu to indicate right ear hearing test results, such as Normal, Discharge, Foreign Objects, Cerement, Failure @ 500/25 db, Failure @ 1000/25 db, Failure @ 2000/25 db, Failure @

	4000/25 db, Failure @ 2 or more frequencies, Permanent Disability, or Unable to Test.
Left Ear Test Result	Use the pop-up menu to indicate left ear hearing test results, such as Normal, Discharge, Foreign Objects, Cerement, Failure @ 500/25 db, Failure @ 1000/25 db, Failure @ 2000/25 db, Failure @ 4000/25 db, Failure @ 2 or more frequencies, Permanent Disability, or Unable to Test.
Test Type	Use the pop-up menu to indicate the type of hearing test that was administered.
Hearing Referral Date	Enter the date the student was recommended a hearing aid or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Hearing Aid	Enter the type of hearing aid that has been recommended to the student.
Test Conducted Late	Use the checkbox to indicate whether or not the hearing screening was administered on time.

7. Use the following table to enter information in the Outcome & Comment fields:

Field	Description
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening. **Note:** Display values vary based on selected screening: • Hearing and Vision and Color screenings values may include Referred to Doctor/New Case, Referred to Doctor, Failed/Not Referred, No Change, Improved by Prescription, Screening Inconclusive, Permanent Disability, Passed, or Referred Non-Acuity Pr ob. • Oral Health screenings values may include No Visible Decay, Visible Decay, or Visible Decay and Fillings Present.

	• Scoliosis, Tuberculosis, and Vital Signs/Biometrics screenings values may include Pass or Fail.
Comment	Enter additional information regarding the screening, as needed.

8. Click **Add**. The Add Hearing dialog closes.
9. Click **Submit**.

How to Add an Oral Health Screening Record

Use this procedure to enter oral health screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Screening** and choose **Oral Health Screening**. The Add Oral Health Screening dialog appears.
5. Enter information in the Screening Details fields, as needed. For Screening Details field descriptions, see *How to Enter a Hearing Screening Record*.
6. Use the following table to enter information in the Assessment fields:

Field	Description
Dental Sealants Present	Use the pop-up menu to indicate whether or not the student has received dental sealants, such as Yes or No.
Malocclusion	Use the pop-up menu to indicate whether or not the student has been diagnosed with Malocclusion, such as Yes or No.
History of Caries Present	Use the pop-up menu to indicate whether or not the student has a history of Caries, such as Yes or No.

Untreated Caries Present	If a student has been diagnosed with Caries, use the pop-up menu to indicate whether or not the student has received treatment, such as Yes or No.
Treatment Urgency	Use the pop-up menu to indicate the need for treatment, such as, No obvious problem found, Early dental care is recommended, or Urgent care is needed.

7. Enter information in the Outcome & Comment fields, as needed. For Outcome & Comment field descriptions, see *How to Enter a Hearing Screening Record*.
8. Click **Add**. The Add Oral Health Screening dialog closes.
9. Click **Submit**.

How to Add a Scoliosis Screening Record

Use this procedure to enter Scoliosis screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Screening** and choose **Scoliosis Screening**. The Add Scoliosis Screening dialog appears.
5. Enter information in the Screening Details fields, as needed. For Screening Details field descriptions, see *How to Enter a Hearing Screening Record*.
6. Use the following table to enter information in the X-Ray fields:

Field	Description
X-Ray Film Date	Enter the date timestamp of the X-Ray film or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.

X-Ray Film Impression	Use the pop-up menu to indicate the severity of the Scoliosis, such as Abnormal, Normal, or No X-Ray.

7. Enter information in the Outcome & Comment fields, as needed. For Outcome & Comment field descriptions, see *How to Enter a Hearing Screening Record*.
8. Click **Add**. The Add Scoliosis Screening dialog closes.
9. Click **Submit**.

How to Add a Tuberculosis Screening Record

Use this procedure to enter Tuberculosis screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Screening** and choose **Tuberculosis Screening**. The Add Tuberculosis Screening dialog appears.
5. Enter information in the Screening Details fields, as needed. For Screening Details field descriptions, see *How to Enter a Hearing Screening Record*.
6. Use the following table to enter information in the Test and X-Ray fields:

Field	Description
Skin Test Given Date	Enter the date timestamp the skin test was performed or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Skin Test Read Date	Enter the date timestamp the skin test was read or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Skin Test Type	Use the pop-up menu to indicate the type of skin test that was administered.

In duration Size	Enter the size of the in duration in millimeters (mm).
Skin Test Result	Use the pop-up menu to indicate the results of the impression, such as Positive or Negative.
Chest X-Ray Film Date	Enter the date timestamp of the chest X-Ray film or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Chest X-Ray Impression	Use the pop-up menu to indicate the results of the chest X-Ray impression, such as Normal or Abnormal.

7. Enter information in the Outcome & Comment fields, as needed. For Outcome & Comment field descriptions, see *How to Enter a Hearing Screening Record*.
8. Click **Add**. The Add Tuberculosis Screening dialog closes.
9. Click **Submit**.

How to Add a Vision and Color Screening Record

Use this procedure to enter vision and color screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Screening** and choose **Vision and Color Screening**. The Add Vision and Color Screening dialog appears.
5. Enter information in the Screening Details fields, as needed. For Screening Details field descriptions, see *How to Enter a Hearing Screening Record*.
6. Use the following table to enter information in the Vision and Color fields:

Field	**Description**

Vision Referral Date	Enter the date the student was recommended a vision aid or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Test Conducted Late	Use the checkbox to indicate whether or not the vision screening was administered on time.
Right Eye Vision Test Result	Use the pop-up menu to indicate the results of the right eye test, such as 20/20, 20/30, 20/40, 20/50, 20/70, 20/100, 20/200, 20/20 Corrected, 20/30 Corrected, 20/40 Corrected, 20/50 Corrected, 20/70 Corrected, 20/100 Corrected, 20/200 Corrected, Signs, Permanent Disability, and Unable to Test.
Left Eye Vision Test Result	Use the pop-up menu to indicate the results of the left eye test, such as 20/20, 20/30, 20/40, 20/50, 20/70, 20/100, 20/200, 20/20 Corrected, 20/30 Corrected, 20/40 Corrected, 20/50 Corrected, 20/70 Corrected, 20/100 Corrected, 20/200 Corrected, Signs, Permanent Disability, and Unable to Test.
Color Blind Test Result	Use the pop-up menu to indicate the results of the color blind test, such as Pass, Fail Blue/Yellow, or Fail Red/Green.
Vision Aid	Enter the type of vision aid that has been recommended to the student.

7. Enter information in the Outcome & Comment fields, as needed. For Outcome & Comment field descriptions, see *How to Enter a Hearing Screening Record*.
8. Click **Add**. The Add Vision and Color Screening dialog closes.
9. Click **Submit**.

How to Add a Vital Signs/Biometrics Screening Record

Use this procedure to enter vital signs and biometrics screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.

3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Screening** and choose **Vital Signs/Biometrics Screening**. The Add Vital Signs/Biometrics Screening dialog appears.
5. Enter information in the Screening Details fields, as needed. For Screening Details field descriptions, see *How to Enter a Hearing Screening Record*.
6. Use the following table to enter information in the Biometrics fields:

Field	**Description**
Height	Enter the student's height in inches, if your district is using US units of measure, or meters, if your district is using international units of measure. **Note:** Two decimal places allowed.
Height Percentile	Enter the student's height percentile.
Weight	Enter the student's weight in pounds, if your district is using US units of measure, or kilograms, if your district is using international units of measure. **Note:** Two decimal places allowed.
Weight Percentile	Enter the student's weight percentile.
Weight Status	Use the pop-up menu to indicate the student's weight status, such as Normal, Obese, Overweight, or Underweight.
BMI	The student's Body Mass Index is calculated automatically once a height and weight is entered.

7. Use the following table to enter information in the Vital Signs fields:

Field	**Description**

Systolic Blood Pressure	Enter the student's Systolic Blood Pressure.
Diastolic Blood Pressure	Enter the student's Diastolic Blood Pressure.
Resting Heart Rate	Enter the student's resting heart rate.
Temperature	Enter the student's body temperature.

8. Enter information in the Outcome & Comment fields, as needed. For Outcome & Comment field descriptions, see *How to Enter a Hearing Screening Record*.
9. Click **Add**. The Add Vital Signs/Biometrics Screening dialog closes.
10. Click **Submit**.

How to Edit a Screening Record

Use this procedure to edit screening information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click the **Pencil** icon next to the screening record you want to edit. The Edit Screening dialog for the selected screening record appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this information. Click the **Eye** icon next to the screening record you want to view. The Screening dialog appears. When you are done viewing, close the dialog.

5. Edit information as needed. For field descriptions, see the appropriate *How to Add a Screening Record* procedure.
6. Enter the reason for updating the screening record in the **Change Reason** text box.
7. Click **Update**. The Edit Screening dialog closes.
8. Click **Submit**.

How to Delete a Screening Record

Use this procedure to delete a student's screening record that may have been created in error.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click the **Minus (-)** button next to the screening record you want to delete. The screening record appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

5. Repeat Step 4 for each screening record you want to delete.
6. Click **Submit**.

Enter Student Screening Waivers

In addition to entering screening information for a student using the Screenings tab on the student Health page, you can also create waivers specific to each screening type. This topic covers how to add, edit, and delete student screening waivers. To add, edit, and delete student screening records, see *Enter Student Screening Records*.

Note: Based on your group security permissions, you may be able to view only, view/modify, or view/modify/delete. For more information, see *Set Group Security Permissions*.

How to View a Student's Screening Waiver Summary

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab. The Screenings tab displays the following information:

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Type</td><td>The type of screening waiver:
Hearing Waiver
Oral Health Waiver
Scoliosis Waiver
Tuberculosis Waiver
Vision Waiver
Vital Signs/Biometrics Waiver
Hover over the screening waiver name to view the following information:
Parent Requesting Waiver
Grade Level
Waiver Reason</td></tr>
<tr><td>Date</td><td>The date the screening was waived.</td></tr>
<tr><td>Outcome</td><td>Not applicable to waivers.
Note: Only applicable to screenings.</td></tr>
<tr><td>Comment</td><td>Additional information regarding the screening waiver.</td></tr>
</table>

How to Add a Screening Waiver

Use this procedure to enter screening waiver information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click **+ Add Waiver** and choose one of the following:

- **Hearing Waiver**
- **Oral Health Waiver**
- **Scoliosis Waiver**
- **Tuberculosis Waiver**
- **Vision Waiver**
- **Vital Signs/Biometrics Waiver**

The Add Waiver dialog for the selected screening appears.

5. Use the following table to enter information in the Screening Waiver Details fields:

Field	Description
Parent Requesting Waiver	Enter the name of the parent or guardian who requested the screening waiver.
Waiver Date	Enter the date the screening was waived or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month. **Note:** By default, today's date appears.
Grade Level	Use the pop-up menu to indicate the grade level the student was in when the screening waiver was requested. **Note:** By default, the student's current grade level appears.

6. Use the following table to enter information in the Reason & Comment fields:

Field	Description
Waiver Reason	Use the pop-up menu to indicate the reason the screening waiver was requested.
Comment	Enter additional information regarding the screening waiver, as needed.

7. Click **Add**. The Add Screening Waiver dialog closes.

8. Click **Submit**.

How to Edit a Screening Waiver

Use this procedure to edit screening waiver information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click the **Pencil** icon next to the screening waiver you want to edit. The Edit Screening Waiver dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

5. Edit information as needed. For field descriptions, see *How to Add a Screening Waiver*.
6. Click **Update**. The Edit Screening Waiver dialog closes.
7. Click **Submit**.

How to Delete a Screening Waiver

Use this procedure to delete a student's screening waiver that may have been created in error.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Screenings** tab.

   Note: Click the **Type**, **Date**, **Outcome** or **Comment** column to sort by that column.

4. On the Screenings tab, click the **Minus (-)** button next to the screening waiver you want to delete. The screening waiver appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

5. Repeat Step 4 for each screening waiver you want to delete.
6. Click **Submit**.

Enter Student Office Visits

Students are seen in the school nurse's office for a variety of reasons. Using the Office Visits tab on the student Health page, you can enter office visit information for a student.

Note: Based on your group security permissions, you may be able to view only, view/modify, or view/modify/delete. For more information, see *Set Group Security Permissions*.

How to Add an Office Visit Record

1. Use this procedure to enter office visit information for a student.
2. On the start page, search for and select a student. For more information, see *Student Search*.
3. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
4. Click the **Office Visits** tab.

   Note: Click the **Visit Type**, **Date**, or **Reason** column to sort by that column.

5. On the Office Visits tab, click **+ Add**. The Add Office Visit dialog appears.
6. Use the following table to enter information in the Visit Details fields:

Field	Description
Visit Type	Use the pop-up menu to indicate the purpose of the office visit.
Contact with Parent	Select the checkbox to indicate that a parent of the student has been contacted as a result of the office visit. Otherwise, leave blank.
Provider Name	Enter the name of the person conducting the office visit. **Note:** By default, the name of the user signed in appears.
Provider Type	Use the pop-up menu to indicate the type of office visit.

	Note: This setting is retained as you move through PowerSchool.
Visit Date	Enter the date the student visited the office or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month. **Note:** By default, today's date appears.
Visit Time In	Enter the time the student's office visit began. **Note:** By default, the current time appears.
Visit Time Out	Enter the time the student's office visit ended. **Note:** The first time you click the field, the field automatically populates with the current time.

7. Use the following table to enter information in the Visit Reasons fields:

Field	Description
Issue/Visit Reason	Enter a description of the issue or reason for the office visit, if needed.
Assessment	Enter a description of the assessment of the issue or reason for the office visit, if needed.

8. Use the following table to enter information in the Outcome & Actions fields:

Field	Description
Visit Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the office visit.
Actions	Enter additional information regarding the decision or action taken as a result of the office visit, as needed.

9. Click **Add**. The Add Office Visit dialog closes.
10. Click **Submit**.

How to Edit an Office Visit Record

Use this procedure to edit office visit information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Office Visits** tab.

   Note: By default, office visits are sorted by date with the most recent office visit appearing first. Click the **Visit Type**, **Date**, or **Reason** column to sort by that column.

4. On the Office Visits tab, click the **Pencil** icon next to the office visit record you want to edit. The Edit Office Visit dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this information. Click the **Eye** icon next to the office visit record you want to view. The Office Visit dialog appears. When you are done viewing, close the dialog.

5. Edit information as needed. For field descriptions, see *How to Add an Office Visit Record*.
6. Enter the reason for updating the screening record in the **Change Reason** text box.
7. Click **Update**. The Edit Office Visit dialog closes.
8. Click **Submit**.

How to Delete an Office Visit Record

Use this procedure to delete a student's office visit record that may have been created in error.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Office Visits** tab.

   Note: Click the **Visit Type**, **Date**, or **Reason** column to sort by that column.

4. On the Office Visits tab, click the **Minus (-)** button next to the office visit record you want to delete. The office visit record appears shaded.

   Note: Click the **Revert** icon (counterclockwise arrow) to undo the deletion.

5. Repeat Step 4 for each office visit record you want to delete.
6. Click **Submit**.

How to View a Student's Office Visit Record Change History

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Office Visit** tab.
4. On the Office Visit tab, click **View Change History**. The Change History dialog appears.
5. Do one of the following:
   - Click the arrow next to **the date** to expand the list.
   - Click the arrow again to condense the list.
   - Click **Expand All Items** to view all entries.
   - Click **Collapse All Items** to minimize all entries.
6. Click **X** to close the dialog.

Enter Student Grade Level Entry Certification Records

Your state may require grade level entry certifications to be recorded to ensure that health-related requirements have been met prior to a student's entry into a grade level. Using the Grade Level Entry Certifications tab on the student Health page, you can enter health-related grade entry requirements for a student.

Note: Based on your group security permissions, you may be able to view only, view/modify, or view/modify/delete. For more information, see *Set Group Security Permissions*.

How to Add a Grade Level Entry Certification Record

Use this procedure to enter grade level entry certification information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Grade Level Entry Certifications** tab.

   Note: Click the **Grade Level**, **Date**, **Comment**, or **Certification Status** column to sort by that column.

4. On the Grade Level Entry Certifications tab, click **+ Add Grade Level** and choose the grade level for which you want to add the certification. The Add Grade Level Entry Certification dialog appears.
5. Use the following table to enter information in the fields:

Field	Description
Certifier	Enter the first and last name of the individual certifying the grade level entry.
Certification Date	Enter the certification date or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Certification Status	Use the pop-up menu to choose the appropriate certification status.
Comment	Enter additional information regarding the certification, as needed.

6. Click **Add**. The Add Grade Level Entry Certification dialog closes.
7. Click **Submit**.

How to Edit a Grade Level Entry Certification Record

Use this procedure to edit grade level entry certification information for a student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Grade Level Entry Certifications** tab.

Note: Click the **Grade Level**, **Date**, **Comment**, or **Certification Status** column to sort by that column.

4. On the Grade Level Entry Certifications tab, click the **Pencil** icon next to the grade level entry certification record you want to edit. The Edit Grade Level Entry Certification dialog appears.

   Note: If an Eye icon appears instead of the Pencil icon, you have view only access to this page.

5. Edit information as needed. For field descriptions, see *How to Add a Grade Level Entry Certification Record*.
6. Click **Update**. The Edit Grade Level Entry Certification dialog closes.
7. Click **Submit**.

How to Delete a Grade Level Entry Certification Record

Use this procedure to delete a student's grade level entry certification record that may have been created in error.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Health** from the student pages menu. The Health page appears for that student.
3. Click the **Grade Level Entry Certifications** tab.

   Note: Click the **Grade Level**, **Date**, **Comment**, or **Certification Status** column to sort by that column.

4. On the Grade Level Entry Certifications tab, click the **Minus (-) button** next to the grade level entry certification record you want to delete. The grade level entry certification record appears shaded.
5. Repeat Step 4 for each grade level entry certification record you want to delete.
6. Click **Submit**.

Student Search

Search for Students by Immunization Compliance

The immunization compliance function provides you with the ability to search for students based on their compliancy status and/or exemption status for one or more vaccines.

How to Search for Students by Immunization Compliance

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Validation, choose **Immunization Compliance**. The Immunization Compliance page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students	Indicate which students you want to search for by selecting one of the following options: • Select **All active students** to search all students currently enrolled in the selected school. • Select **The selected students** to search only students within the current selection.
Vaccine	Indicate which vaccine(s) you want to evaluate by selecting one of the following options: • Select **Any mandatory vaccines** to evaluate any vaccines. Selecting this option returns students who meet the compliance, exemption, and dose (if specified) parameters for any immunization record. • Select **Only this vaccine** and then choose the vaccine you want to evaluate from the pop-up menu. Selecting this

	option returns students who meet the compliance, exemption, and dose (if specified) parameters for the immunization record associated with the specified vaccine.
Compliance	Indicate which vaccine compliancy status you want to search for by selecting one of the following options: • Select **Not Compliant** to search for students who are not current for the selected vaccine(s). • Select **Compliant** to search for students who are current for the selected vaccine(s). • Select **Any** to search for students regardless of their vaccine compliancy status.
Exemption	Indicate which vaccine exemption status you want to search for by selecting one of the following options: • Select **Not Exempt** to search for students who are not exempt from the selected vaccine(s). • Select **Exempt** to search for students who are exempt from the selected vaccine(s). • Select **Any** to search for students regardless of their vaccine exemption status.
Doses	To narrow your search by the number of doses of a vaccine that have been received, enter the appropriate number in the **Fewer than** field.

5. Click **Submit**. The Immunization Compliance Results page displays a summary of student immunization compliancy information based on the parameters you selected. The students who appear in this summary have at least one immunization record that meets the specified compliance value and the specified exemption value and contains less than the specified number of doses (if a dose value is entered).
6. Do one of the following:
    - Click **View Current Selection**. The Student Selection page displays the current selection of students.
    - Click **Print Reports for the Current Selection**. The Reports page appears.

- Click **Go to the student Health screen for the first student in the Current Selection**. The Health page for the selected student appears.

  Note: This option is only available when the Current Selection contains at least one student.

Work with Student Groups

Health Screenings

Using the Health Screenings group function, you can view health screening information for a selected group of students for a selected date and screening type. Additionally, you can set default screening values for particular screening types and apply them to the selected group of students, as needed.

Note: The Health Screenings group function is only available if you have unrestricted field level access to the student grade level field (or Students.Grade_Level in the database). For more information, see *Field Level Security*.

Note: Default screening values that are created using the Health Screenings group function are user-specific and only available to the user who created them. Default screening values that are created at the district level (**Start Page > District > Health > Screenings**) are available to all schools within the district.

View Health Screenings

Use this procedure to view health screening information for a selected group of students for a selected date and screening type.

How to View Health Screenings

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the Select Student and Screening Types fields:

Field	Description

<table>
<tr><td>Student Selection</td><td>Indicate the students you would like to work with by selecting one of the following options:
Current Selection (#)
By Class (#)
By default, the Current Selection option is selected.

Note: The number of students appears in parenthesis next to the Current Selection option. Click the number to view the current student selection on the Search Students page.

If you select the By Class option:
Choose which teacher from the Teacher pop-up menu.
Choose which course from the Course pop-up menu.
Choose which section from the Section pop-up menu.

Note: Section information includes the course expression, term, and section. Sections are sorted by term, then expression.
Note: To make the By Class option the current selection, click Make Current Selection. The class size appears in parenthesis next to the By Class option. Click the number to view the current student selection on the Search Students page.</td></tr>
<tr><td>Screening Date</td><td>Enter the screening date or click the Calendar icon to select a date.</td></tr>
<tr><td>Screening Type</td><td>Choose which screening type you want to work with from the pop-up menu:
Hearing
Oral Health
Scoliosis
Tuberculosis
Vision and Color
Vital Signs/Biometrics</td></tr>
</table>

Select Default Screening Values	For detailed information, see *Set Default Screening Values*.
Columns to Display	Select the checkbox for each column of data you want to display. **Note:** Checkboxes appear based on the **Screening Type** selected. **Note:** Your checkbox selection is retained and available each time you navigate back to this screening type.

5. Click **Next**. The following information displays in the Create Screenings section:

   Note: Once information displays, the button appears as **Refresh Table**.

Field	Description
Entered	If a record already exists for the student for the selected date and screening type, a checkmark appears. Alternately, if a record does not exist for the student for the selected date and screening type, a checkmark does not appear.
Name	The student's name appears. You can click to set screening values for the individual student.
[Columns]	Columns display in the summary table based on the Columns to Display selection.

Set Default Screening Values

Using the Default Values function, you can set default values for each of the following screenings:

- Hearing
- Oral Health
- Scoliosis
- Tuberculosis
- Vision and Color
- Vital Signs/Biometrics

Note: Default values set using the Default Values function override the defaults set by the district.

Note: Once you have entered default screening values for a screening, those default values are retained for future use.

Note: Default screening values are not automatically applied to every student within the selected group. To apply the default screening values and any additional entries or edits you have, you must set the screening values for each student within the selected group. For more information, see *Set Screening Values*.

How to Set Default Screening Values for Hearing

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Hearing** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Hearing drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.

Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Right Ear Test Result	Use the pop-up menu to indicate right ear hearing test results, such as Normal, Discharge, Foreign Objects, Cerement, Failure @ 500/25 db, Failure @ 1000/25 db, Failure @ 2000/25 db, Failure @ 4000/25 db, Failure @ 2 or more frequencies, Permanent Disability, or Unable to Test.
Left Ear Test Result	Use the pop-up menu to indicate left ear hearing test results, such as Normal, Discharge, Foreign Objects, Cerement, Failure @ 500/25 db, Failure @ 1000/25 db, Failure @ 2000/25 db, Failure @ 4000/25 db, Failure @ 2 or more frequencies, Permanent Disability, or Unable to Test.
Test Type	Use the pop-up menu to indicate the type of hearing test that was administered.
Hearing Referral Date	Enter the date the student was recommended a hearing aid or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Hearing Aid	Enter the type of hearing aid that has been recommended to the student.
Test Conducted Late	Use the checkbox to indicate whether or not the hearing screening was administered on time.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Oral Health

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Oral Health** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Oral Health drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Dental Sealants Present	Use the pop-up menu to indicate whether or not the student has received dental sealants, such as Yes or No.
Malocclusion	Use the pop-up menu to indicate whether or not the student has been diagnosed with Malocclusion, such as Yes or No.

History of Caries Present	Use the pop-up menu to indicate whether or not the student has a history of Caries, such as Yes or No.
Untreated Caries Present	If a student has been diagnosed with Caries, use the pop-up menu to indicate whether or not the student has received treatment, such as Yes or No.
Treatment Urgency	Use the pop-up menu to indicate the need for treatment, such as, No obvious problem found, Early dental care is recommended, or Urgent care is needed.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Scoliosis

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Scoliosis** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Scoliosis drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
X-Ray Film Date	Enter the date timestamp of the X-Ray film or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
X-Ray Film Impression	Use the pop-up menu to indicate the severity of the Scoliosis, such as Abnormal, Normal, or No X-Ray.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Tuberculosis

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Tuberculosis** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Tuberculosis drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	**Description**
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Skin Test Given Date	Enter the date timestamp the skin test was performed or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Skin Test Read Date	Enter the date timestamp the skin test was read or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Skin Test Type	Use the pop-up menu to indicate the type of skin test that was administered.
In duration Size	Enter the size of the in duration in millimeters (mm).
Skin Test Result	Use the pop-up menu to indicate the results of the impression, such as Positive or Negative.

Chest X-Ray Film Date	Enter the date timestamp of the chest X-Ray film or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Chest X-Ray Impression	Use the pop-up menu to indicate the results of the chest X-Ray impression, such as Normal or Abnormal.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Vision and Color

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Vision and Color** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Vision and Color drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description

Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Vision Referral Date	Enter the date the student was recommended a vision aid or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Test Conducted Late	Use the checkbox to indicate whether or not the vision screening was administered on time.
Right Eye Vision Test Result	Use the pop-up menu to indicate the results of the right eye test, such as 20/20, 20/30, 20/40, 20/50, 20/70, 20/100, 20/200, 20/20 Corrected, 20/30 Corrected, 20/40 Corrected, 20/50 Corrected, 20/70 Corrected, 20/100 Corrected, 20/200 Corrected, Signs, Permanent Disability, and Unable to Test.
Left Eye Vision Test Result	Use the pop-up menu to indicate the results of the left eye test, such as 20/20, 20/30, 20/40, 20/50, 20/70, 20/100, 20/200, 20/20 Corrected, 20/30 Corrected, 20/40 Corrected, 20/50 Corrected, 20/70 Corrected, 20/100 Corrected, 20/200 Corrected, Signs, Permanent Disability, and Unable to Test.
Color Blind Test Result	Use the pop-up menu to indicate the results of the color blind test, such as Pass, Fail Blue/Yellow, or Fail Red/Green.
Vision Aid	Enter the type of vision aid that has been recommended to the student.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.

Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Vital Signs/Biometrics

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Vital Signs/Biometrics** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Vital Signs/Biometrics drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.

Height	Enter the student's height in inches, if your district is using US units of measure, or meters, if your district is using international units of measure. **Note:** Two decimal places allowed.
Height Percentile	Enter the student's height percentile.
Weight	Enter the student's weight in pounds, if your district is using US units of measure, or kilograms, if your district is using international units of measure. **Note:** Two decimal places allowed.
Weight Percentile	Enter the student's weight percentile.
Weight Status	Use the pop-up menu to indicate the student's weight status, such as Normal, Obese, Overweight, or Underweight.
BMI	The student's Body Mass Index is calculated automatically once a height and weight is entered.
Systolic Blood Pressure	Enter the student's Systolic Blood Pressure.
Diastolic Blood Pressure	Enter the student's Diastolic Blood Pressure.
Resting Heart Rate	Enter the student's resting heart rate.
Temperature	Enter the student's body temperature.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Edit Default Screening Values

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose the screening you want to work with from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values drawer appears for the selected screening.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Edit information as needed. For field descriptions, see respective *How to Set Default Screening Values for* procedure.
7. Click **Save and Close**. The drawer closes.

How to Revert Default Screening Values to District Defaults

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose the screening you want to work with from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.

5. Click **Default Values**. The Set Default Screening Values drawer appears for the selected screening.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Click **Clear User Defaults**.
7. Click **Confirm Clear User Defaults**. The drawer closes.

Set Screening Values

Default screening values are not automatically applied to every student within the selected group. To apply the default screening values and any additional entries or edits you have, you must set the screening values for each student within the selected group. Using the **Save and Next** button, you can set screening values for each student in rapid succession.

Note: Default screening values will not overwrite any existing screening values that have already been entered for a student.

How to Set Screening Values

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed. For field description table, see *How to View Health Screenings*.
5. Click **Next**. Information displays in the Create Screenings section.

   Note: Once information displays, the button appears as **Refresh Table**. If you make changes to the Select Student and Screening Types fields, click **Refresh Table** to update the information that appears in the Create Screenings section.

6. Click the name of the student you want to work with. The Set Screening Values - [Screening Type] drawer appears.
7. Use the following table to edit information in the fields:

Field	Description
[Student]	The student's name.
[Student ID]	The student's student identification number.
[Date of Birth]	The student's date of birth.
View All Screenings	Click to view all screenings for the student. The Screenings tab on the student Health page displays.
Screening Provider Name	Enter the name of the person or facility that performed the screening. **Note:** This setting is retained as you move through PowerSchool.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Grade Level	Use the pop-up menu to indicate the student's grade level when the screening waiver was performed. **Note:** All grade levels for the district appear. By default, the student's current grade level is selected.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External. **Note:** This setting is retained as you move through PowerSchool.
[Fields]	For field descriptions, see respective *How to Set Default Screening Values for* procedure.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

Change Reason	Enter the reason for updating the screening record.

8. Do one of the following:
   - Click **Save and Close**. The drawer closes, and screening values are applied to the selected student.
   - Click **Save and Next**. The Set Screening Values - [Screening Type] drawer displays information for the next student in the Create Screenings section.

Delete Screening Records

If a student's screening record was created in error, you can use the Delete function to remove the record. The Delete function is only available if a record already exists for a student indicated by a checkmark in the **Entered** column.

How to Delete a Screening Record

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed. For field description table, see *How to View Health Screenings*.
5. Click **Next**. Information displays in the Create Screenings section.

   Note: Once information displays, the button appears as **Refresh Table**. If you make changes to the Select Student and Screening Types fields, click **Refresh Table** to update the information that appears in the Create Screenings section.

6. Click the name of the student you want to work with. The Set Screening Values - [Screening Type] drawer appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The drawer closes. The checkmark no longer appears next to the student's name in the Create Screenings section.

Health Data Grid

The Health Data Grid is the central point from which you can quickly and easily view immunization and screenings information for your school or district, as well as create a customized search filter to locate specific immunization and screenings information. When signed in to at the school level, you can view immunization and screenings information from the selected school. When signed in to at the district level, you can view immunization and screenings information for all schools within the district.

Page-Level Permission

To ensure that only staff members whose job duties include health management can access the Health Data Grid, you can define which staff members can access the page by setting permissions at the page level. For detailed information, see *Page-Level Permissions*.

Search for Immunization Records

Use the following procedure to search for immunization records.

Note: Information on this page displays based on your security settings.

How to Search for Immunization Records

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Health Management**. The Health Management page appears.
3. Click the **Immunization** tab, if needed.
4. Use the following table to enter information in the Student Immunization Counts section:

Field	Description
Immunization Mode	Use the pop-up menu to select the type of immunization information you want to view: • **Not Compliant** to view students who are not current with their immunizations. • **Compliant** to view students who are current with their immunizations.

	• **Exempt** to view students who are exempt from immunizations. • **Not Recorded** to view students who are missing one or more immunization records. **Note:** By default, **Not Compliant** is selected.
[Student Immunization Counts]	The first tile to display depends on the selected **Immunization Mode**: • If **Not Compliant** is selected, the **Any** tile displays the total count of students who are not current with their immunizations. • If **Compliant** is selected, the **All** tile displays the total count of students who are current with their immunizations. • If **Exempt** is selected, the **Any** tile displays the total count of students who are exempt from any immunizations. • If **Not Recorded** is selected, the **Any** tile displays the total count of students who are missing immunization records. Each subsequent tile is representative of a student immunization count. Tiles appear in alphabetical order. Click a tile to switch to a filter. **Note:** Carousel navigation may appear based on the size of your screen. You can use to navigate the tiles.

5. Use the following table to enter information in the Filter section:

   Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	**Description**
Immunization	Filter information for the selected tile appears.
Use Current Selection	Select the checkbox to view immunization information for only students in the current student selection.

<table>
<tr><td>Student</td><td>To further narrow the list students:

1. Click the Add (+) button.
2. Choose Student from the first pop-up menu.
3. Enter the student's name or a portion of the student's name.
4. Click Apply.

Note: Format must be last, first.</td></tr>
<tr><td>Grade Level</td><td>To further narrow the list of students by the grade level:

1. Click the Add (+) button.
2. Choose Grade Level from the first pop-up menu.
3. Choose a grade level from the second pop-up menu.
4. Click Apply.</td></tr>
<tr><td>Home Phone</td><td>To further narrow the list of students by home phone:

1. Click the Add (+) button.
2. Choose Home Phone from the first pop-up menu.
3. Enter the student's home phone number or a portion of the home phone number.
4. Click Apply.</td></tr>
<tr><td>School</td><td>To further narrow the list of students by the school:

1. Click the Add (+) button.
2. Choose School from the first pop-up menu.
3. Choose a school name from the second pop-up menu.
4. Click Apply.

Note: This only appears if at the district level.</td></tr>
<tr><td>Comment</td><td>To further narrow the list of students by the comment:

1. Click the Add (+) button.
2. Choose Comment from the first pop-up menu.</td></tr>
</table>

	3. Enter a comment or a portion of the comment. 4. Click **Apply**. **Note:** This only appears if **Exempt** and an **[Immunization]** tile are selected.
Count	To further narrow the list of students by count: 1. Click the **Add (+)** button. 2. Choose **Count** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Enter the count in the search field. 5. Click **Apply**. **Note:** This only appears if **Not Recorded** and the **Any** tile are selected.
Exemption Type	To further narrow the list of students by the exemption type: 1. Click the **Add (+)** button. 2. Choose **Exemption Type** from the first pop-up menu. 3. Enter an exemption type. 4. Click **Apply**. **Note:** This only appears if **Exempt** and an **[Immunization]** tile are selected.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

6. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	**Description**
Student	The student's last, first name. Click to view detailed information. For more information, see *Enter Student Immunization Information*.

Grade Level	The student's grade level.
Home Phone	The student's home phone number.
School	The student's school. **Note:** This only appears if at the district level.
Comment	Comments regarding the exemption. **Note:** This only appears if **Exempt** and an **[Immunization]** tile are selected.
Count	The total count of immunizations missing for the student. **Note:** This only appears if **Not Recorded** and the **Any** tile are selected.
Exemption Type	The type of exemption. **Note:** This only appears if **Exempt** and an **[Immunization]** tile are selected.
Immunization	Do one of the following: • Click **Show** to view immunization information. • Click **Hide** to hide immunization information. By default, **Hide** is selected. **Note:** This only appears if either **Not Compliant** or **Exempt** and the **Any** tile are selected.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

Set Current Selection	Select the checkbox for each student you want to work with and then click **Set Current Selection** to make the selected students your current student selection. A confirmation message appears. **Note:** If the checkbox in the header row is selected, all records for the currently applied filters will be selected. The student selection set is retained until you set another current selection.
Download	To download the attendance information, click the arrow and select one of the following from the pop-up menu: • **Comma-Separated Value (CSV)** • **Excel Spreadsheet (XLSX)** • **Portable Document Format (PDF)** **Note:** A checkmark appears next to your selection. **Note:** The PDF format is restricted to a maximum of 1000 records. **Note:** Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format. **Note:** If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language.

Search for Screening Records

Use the following procedure to search for screening records.

Note: Information on this page displays based on your security settings.

How to Display Office Visits and Screenings Entered at Other Schools

Use this procedure to display a student's screenings and office visits entered at a previous school when viewing the student's health records.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Health, click **Health Setup**. The Health page appears.
3. Click the **Setup** tab.

4. Select the **Display Office Visits and Screenings entered at other schools** checkbox.

   Note: Deselect the checkbox to hide a student's screenings and office visits entered at a previous school when viewing the student's health records.

5. Click **Submit**.

How to Search for Screening Records

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Health Management**. The Health Management page appears.
3. Click the **Screenings** tab, if needed.
4. Use the following table to enter information in the Student Screening Counts section:

Field	Description
Screening Mode	Use the pop-up menu to select the type of screening information you want to view: • **Not Completed** to view students who are not current with their screening. • **Completed** to view students who are current with their screening. **Note:** By default, **Not Completed** is selected.
Date Range	Use the pop-up menu to indicate the time frame for which you want to view screening: • **Current Calendar Year** (appears if at district level) • **Current School Year** (appears if at school level) • **Prior Calendar Year** (appears if at district level) • **Prior School Year** (appears if at school level) • **Current Month** • **Prior Month** • **Current Week** • **Prior Week**

	• **Date Range** • **Specific Date** **Note:** At the school level, the default is set to **Current School Year**. At the district level, the default is set to **Current Calendar Year**. If **Date Range** is selected, enter or select a **Start Date** and **End Date** and then click **Apply**. If **Specific Date** is selected, enter or select a date and then click **Apply**.
[Student Screenings Counts]	Each tile is representative of a student screening count. Tiles appear in alphabetical order: • Hearing • Oral Health • Scoliosis • Tuberculosis • Vision and Color • Vital Signs/Biometrics If the **Screening Mode** of **Not Completed** is selected, the tiles display the count of students who are not current with their screening. If the **Screening Mode** of **Completed** is selected, the tiles display the count of students who are current with their screening. Click a tile to switch to a filter.

5. Use the following table to enter information in the Filter section:

   Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	**Description**
Screening	Filter information for the selected tile appears.

Use Current Selection	Select the checkbox to view screening information for only students in the current student selection.
Student	To further narrow the list of students: 1. Click the **Add (+)** button. 2. Choose **Student** from the first pop-up menu. 3. Enter the student's name or a portion of the student's name. 4. Click **Apply**. **Note:** Format must be last, first.
Grade Level	To further narrow the list of students by the grade level: 1. Click the **Add (+)** button. 2. Choose **Grade Level** from the first pop-up menu. 3. Choose a grade level from the second pop-up menu. 4. Click **Apply**.
Home Phone	To further narrow the list of students by home phone: 1. Click the **Add (+)** button. 2. Choose **Home Phone** from the first pop-up menu. 3. Enter the student's home phone number or a portion of the home phone number. 4. Click **Apply**.
School	To further narrow the list of students by the school: 1. Click the **Add (+)** button. 2. Choose **School** from the first pop-up menu. 3. Choose a school name from the second pop-up menu. 4. Click **Apply**. **Note:** This only appears if at the district level.
Waiver	To further narrow the list of students by waiver:

	1. Click the **Add (+)** button. 2. Choose **Waiver** from the first pop-up menu. 3. Choose **Yes** or **No** from the second pop-up menu. 4. Click **Apply**. **Note:** This only appears if the **Screening Mode** of **Not Completed** is selected.
Screening Count	To further narrow the list of students by screening count: 1. Click the **Add (+)** button. 2. Choose **Screening Count** from the first pop-up menu. 3. Choose a comparator from the second pop-up menu. 4. Enter a valid number. 5. Click **Apply**. **Note:** This only appears if the **Screening Mode** of **Completed** is selected.
Screening Outcome	To further narrow the list of students by screening outcome: 1. Click the **Add (+)** button. 2. Choose **Screening Outcome** from the first pop-up menu. 3. Enter the screening outcome or a portion of the screening outcome. 4. Click **Apply**. **Note:** This only appears if the **Screening Mode** of **Completed** is selected and **Show** for **Screening Outcome** has been clicked.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

6. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	Description

Student	The student's last, first name. Click to view detailed information. For more information, see *Enter Student Screening Information*.
Grade Level	The student's grade level.
Home Phone	The student's home phone number.
School	The student's school. **Note:** This column only appears if at the district level.
Waiver	Indicates whether or not the student has a waiver. **Note:** This column only appears if the **Screening Mode** of **Not Completed** is selected.
Screening Count	The total number of screenings for this student. **Note:** This column only appears if the **Screening Mode** of **Completed** is selected.
Screening Outcome	The decision or action taken as a result of the screening. Do one of the following: • Click **Show** to view screening outcome. • Click **Hide** to hide screening outcome. By default, **Hide** is selected. **Note:** This column only appears if the **Screening Mode** of **Completed** is selected.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

Set Current Selection	Select the checkbox for each student you want to work with and then click **Set Current Selection** to make the selected students your current student selection. A confirmation message appears. **Note:** If the checkbox in the header row is selected, all records for the currently applied filters will be selected. The student selection set is retained until you set another current selection.
Download	To download the attendance information, click the arrow and select one of the following from the pop-up menu: • **Comma-Separated Value (CSV)** • **Excel Spreadsheet (XLSX)** • **Portable Document Format (PDF)** **Note:** A checkmark appears next to your selection. **Note:** The PDF format is restricted to a maximum of 1000 records. **Note:** Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format. **Note:** If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language.

Import and Export User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Use PowerSchool's import functions to submit large amounts of information into the system. Use the export functions to retrieve large amounts of information from the system. Before importing or exporting, keep the following concepts in mind.

Importing Menu

The Importing Menu includes the following information:

Field	Description
Quick Import	Click to import records from an ASCII text file. For more information, see *Quick Import*. **Note:** The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.
Quick Import for State-Specific Extended Tables	Click to import records from an ASCII text file. For more information, see *Quick Import for State-Specific Extended Tables*. **Note:** The Quick Import for State-Specific Extended Tables page is now also accessible via **Start > System > Page and Data Management > Quick Import for State-Specific Extended Tables**.
Import Using Template	Click to import records from an ASCII text file using an import template for Student, Staff, and Course records. For more information, see *Import Using Template*. **Note:** The Import Using Template page is now also accessible via **Start > System > Page and Data Management > Import Using Template**.
Templates for Importing	Click to configure import mapping templates for common imports into Student, Staff, and Course records. For more information, see *Templates for Importing*.

	Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.
Data Import Manager	Click to access the import manager. For more information, see *Data Import Manager*. **Note:** The Data Import Manager page is now also accessible via **Start > System > Page and Data Management > Data Import Manager**.
Data Import Queue	Click to view in progress and completed imports. For more information, see *Data Import Queue*. **Note:** The Data Import Queue page is now also accessible via **Start > System > Page and Data Management > Data Import Queue**.

Exporting Menu

The Exporting Menu includes the following information:

Field	Description
Quick Export	Click to export student data. For more information, see *Quick Export*. **Note:** The Quick Export page is now also accessible via **Start > System > Page and Data Management > Quick Export**.
Export Using Template	Click to export using an existing template. For more information, see *Export Using Template*. **Note:** The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.
Templates for Exporting	Click to set up export templates. For more information, see *Templates for Exporting*.

	Note: The Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.
Data Export Manager	Click to access the export manager. For more information, see *Data Export Manager*. **Note:** The Data Export Manager page is now also accessible via **Start > System > Page and Data Management > Data Export Manager**.

Select a Group

Before you can import or export, you must select a group of students whose records you want to review. For more information, see *Student Search*.

Importing Enrollment Dates

You can import student information into PowerSchool using *Quick Import* or *AutoComm*. When you import a student record that has an enrollment date prior to or "less than" the current date, the student record is considered "historical." Historical student records are considered inactive students. Therefore, when searching for such students, your search criteria must start with a slash ("/") to search all student records.

Importing Enrollment IDs

Basics

- If the EnrollmentID column (Students table) or ID column (ReEnrollments table) is not included in the import, PowerSchool retains the existing value (on an update to a Students table record) or generates a new unique value.
- If the EnrollmentID column (Students table) or ID column (ReEnrollments table) is included in the import with data (values), PowerSchool uses the imported value, assuming it is not already in use by another enrollment. If it is in use, an error message indicating such displays.
- If the EnrollmentID column (Students table) or ID column (ReEnrollments table) is included in the import without data (values), PowerSchool generates a new value, even if one already exists. In general, this is not recommended, as existing information may be used for state reporting.
- The Students table allows for updating of records, whereas the ReEnrollments table does not.

Students Table

- In general, it is recommended to not include the EnrollmentID column when importing into the Students table. When the EnrollmentID column is not included, PowerSchool automatically determines if an EnrollmentID value already exists. If one exists, the value is retained. If one does not exist, a value is generated.
- Only under certain circumstances it is recommended to include the EnrollmentID column when importing into the Students table. For example, if a Student record has been deleted and needs to be restored from a test or backup server, including the EnrollmentID column would restore the EnrollmentID value back to what it was prior to the deletion of the record (unless the EnrollmentID was different on the test or backup server, in which case it is recommended to not include the EnrollmentID and let PowerSchool generate one). Note that this is just one example where it is recommended to include the EnrollmentID column when importing into the Students table.
- Importing an EnrollmentID column that does not contain data (or contains values of zero) causes EnrollmentIDs to be regenerated for all the imported records, regardless of whether or not an Enrollment ID exists for the record. In general, including the EnrollmentID column without values (or with values of zero) is not recommended.
- If importing new students, you do not need to include the EnrollmentID column. PowerSchool generates a value during the import.

ReEnrollments Table

- The ReEnrollments table does not allow for updating of records. Therefore, to “update” a record, first export the existing data (including the ID field), delete the existing record and then re-import the record with the updated data. When re-importing, include the ID column with the exported values so that the ID will not be regenerated.
- If the ID is left blank or if the ID column is not included, a new ID is generated. In general, this is not recommended as existing information may be used for state reporting.
- “Updating” should be done with caution. It is recommended you perform the update on a test or backup server first prior to performing on a production server.
- If importing new reenrollments, you do not need to include the ID column. PowerSchool generates a value during the import.

Student Number Field

The student number field is essential to moving all of the data in PowerSchool. This field matches student data to the correct student with absolute certainty. Each student has only one number, and everything in PowerSchool is linked to this number. Thus, you should include the student_number field in all documents that you export. You must include the student number in any document that includes data you want to import into PowerSchool. Keep this in mind when exporting, especially if you want to import the data back into PowerSchool after you have worked with it in your spreadsheet application.

Enroll Status Field

The enroll status field indicates a student's current enrollment status, which defines the student's entire basis in school. Enroll status codes include:

- -2 or less = Inactive (Must be set manually by an administrator)
- -1 = Pre-registered
- 0 = Active
- 1 = Inactive (Must be set manually by an administrator)
- 2 = Transferred-Out
- 3 = Graduated Students (Students moved to the "Graduated Students" school.)
- 4 = Imported as Historical
- 5 or higher = Inactive (Must be set manually by an administrator)

More often than not, the only time you will see this code is if you are working within the database. However, you may encounter the code within the student pages of the application for students with an enroll status other than Active, such as Inactive, Graduated Students, or Imported as Historical. In this case, the code appears at the top of the page. This field is used throughout the application and is a key element in searching or querying students.

Field Names

It is important to spell field names correctly. Case sensitivity is unimportant in field names, but spelling must be exactly as noted on the field list. If you omit the underscore, misspell words, or enter a field name that is different from what exists in the field list, PowerSchool cannot find the field and it will not be imported into or exported from the PowerSchool database. If you do not know how a specific field name is written, click **View Field List** on the PowerSchool start page.

Special Export Codes

Use special export codes to include a student's GPA or other calculated value in your import or export. For more information about data codes, see *PowerSchool Data Codes*. You will need your username and password to sign in. If you do not have this information, contact your System Administrator.

Data Versus Reports

Importing or exporting data is different than importing or exporting report templates. When you import or export data, you move information between a spreadsheet application and your PowerSchool database. When importing or exporting a report template, you are copying report parameters from one PowerSchool system to another PowerSchool system. For more information about importing and exporting report templates, see *Alternate Ways to Create Reports* and *Report Templates*.

SIS Views

SIS Views provide quick access to key metrics and not just raw data. These pre-defined SQL queries extract data that can be joined together and filtered to provide customized results. For detailed information, see the *Data Dictionary SIS Views* available on PowerSource.

Import

Quick Import

Use the Quick Import function to bring a large amount of data into PowerSchool. Before completing this procedure, you must have an ASCII text file that contains the data to import and is preferably delimited by tabs.

For information about importing test results, see *How to Import PowerSchool Test Scores*.

Database Extensions and Quick Import

Database extension fields appear while mapping fields from an import file to PowerSchool. When importing and mapping these fields, keep the following in mind:

- As import/export reads from and writes to a text file, binary data is not supported.
- PowerSchool assumes a user only imports data that was exported, therefore it is also assumed that date formats and any other formats do not need to be error-checked on import. The date format used is mm/dd/yyyy.
- Delimiters occurring in the data are not escaped (for example, fields are delimited by tabs, but one field contains tabs) and can cause problems when importing. Data can be wrapped with double quotes to lessen the issue, but there is still data (ex. double quote + tab + double quote) that can cause the same problems.
- Boolean values will be case insensitive, "true/false" or "t/f" or 1/0.

How to Import Data Using Quick Import

Note: Verify that you are signed in to the appropriate school. If the school is incorrect, click **School** at the top of the page to choose a new school before starting this procedure.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Quick Import**. The Quick Import page appears.
4. Use the following table to enter information in the fields:

Field	Description

<table>
<tr>
<td>Table</td>
<td>
Choose the table to which the data will be imported from the pop-up menu:

If you choose the Students table, be sure to import at least 20 student records.
If you choose the Sections table, be sure the target term is selected. For more information, see How to Change Terms.

Note: When importing multiple section records, the expressions of the sections defined by your school are required. An expression is the combination of the periods and days in which the section meets. Though PowerSchool creates internal values for periods and days, you should import the actual values that you want to appear when the system displays expressions. An invalid expression causes an error for that record, which results in the record not being imported.
If you choose the Student Schedules (CC table), be sure to include data in the import file for the following required fields:

Student_Number
Course Number
Section Number
DateEnrolled
Dateleft
TermID
SchoolID

Note: TermID is the Import Term File # value provided on the School > Years & Terms > Edit Terms > Select Term > Edit Term page.

Note: If you include the Dropped column in your import file, any record with a value of True will be imported as a dropped enrollment.
If you attempt to choose the Courses table, but it does not appear in the pop-up menu, then the district may only

</td>
</tr>
</table>

	allow new courses to be created at the district office. For more information, see *How to Edit Course Settings*.
Field Delimiter	Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. • **Tab**: Separates fields with a tab • **Other**: Enter a field delimiter in the blank field, such as a comma
End-of-Line Marker	Choose the end-of-line marker from the pop-up menu. This refers to the item that will separate the records in the exported data. • **CR**: Carriage return • **CRLF**: Carriage return line feed • **LF**: Line feed • **Other**: Enter a delimiter in the blank field
Character Set	Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created: • **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** (Unix) • **UTF-8**
File to Import	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), navigate to the data file, and click **Open**.
Suggest Field Map	Select the checkbox to have the system suggest into which PowerSchool field each piece of data in the data file is saved. These are just suggestions and can be changed before saving.
School	The name of the school for which you are importing data.

5. Click **Import**. The Import Records from an ASCII Text File page appears.

   Note: When importing test results, the Select Test page appears instead. For more information, see *How to Import PowerSchool Test Scores*.

6. Use the following table to enter information in the fields:

Field	Description
From Your File	The fields of the first record from the import file appear.
To PowerSchool	If you select the **Suggest field map** checkbox on the Quick Import page, the PowerSchool fields suggested for each piece of data imported appear. If you do not select the **Suggest field map** checkbox or you need to change the fields, use the pop-up menu to choose the PowerSchool field into which the system imports the data from the import file.
Check to exclude first row	Do one of the following: • Select the checkbox to prevent importing the header row. • Deselect the checkbox to import the first row. This should be used if your import file does not contain a header row.
The lines below can be used to assign a constant value to field(s) in all of the imported records.	To enter a new value in a PowerSchool field for all records from the import file, such as entering the same city for all student records in an import file: 1. Enter the value you want to import for all records. 2. Use the pop-up menu to choose the PowerSchool field into which the system imports the value.

7. Use the following table to enter information in the Advanced Import Options fields:

   Note: Advanced Import Options appear based on the table that was selected from the **Table** pop-up menu.

<table>
<tr><th>Table</th><th>Description</th></tr>
<tr><td>Attendance</td><td>Select the Overwrite existing attendance with the imported attendance checkbox if you want the system to use the imported attendance data in cases where attendance codes already exist for that day or class.</td></tr>
<tr><td>Comment Bank</td><td>Select the Update comment bank records checkbox if you want the system to use the imported comment bank comments in cases where there are already comment bank comments with the same code.</td></tr>
<tr><td>Courses</td><td>Select the Update course records checkbox if you want the system to add course-related information to existing course records in cases where the course numbers are the same.</td></tr>
<tr><td>Historical Grades</td><td>Do the following:
If you want the system to include more than one score for a student only when the term and storecode are the same, select the Allow multiple grades for a student to be stored checkbox.
If the courses in the import file have unrecognized names and you want to specify the course number range for the imported courses, select the If a course name is imported that is not recognized checkbox and enter the range for the new course numbers in the range fields. If you do not select the checkbox, the system will assign a random course number in the 9000 range.
To store grades that include neither a letter grade nor any earned credit, select the Allow grades to be stored which contain both checkbox.</td></tr>
<tr><td>Immunizations</td><td>Do the following:
If you do not want the system to import immunization data that already exists for a student, select the Where values</td></tr>
</table>

	exist in the import file and in PowerSchool, DO NOT IMPORT the values option. • If you do want the system to import immunization data that already exists for a student, select the **Where values exist in the import file and in PowerSchool, OVERWRITE the values in PowerSchool with the values in the import file** option.
Meal Transactions	Select the **Use PowerSchool's internal student id numbers** checkbox if you want the system to reference the ID field versus the student_number field.
Sections	Do the following: • Select the **Update section records** checkbox if you want the system to add section-related information to existing section records in cases where the course and section numbers are the same. • If your school uses AutoComm to synchronize your data in PowerSchool with data in another system, select the **Synchronize Mode** checkbox to perform an AutoComm import. Check with your PowerSchool administrator before using this option.
Students	Select one of the following options to determine what you want the system to do when a student record in the import file contains a student ID number that already exists in PowerSchool: • If you do not want the system to import any record with a student number that already exists, select **Do not process that line from the file being imported**. • If you want the system to update the matching student's record with the data in the import file, select **Update the student's record with the information from the file being imported**. • If you want the system to create a new record if a student ID number is in the import file, select **Generate a new, unique student number for the student (from the range specified below)**. Then, select the checkbox below

	this option and enter the number range within which you want the system to generate and assign the new student ID numbers. • If your school uses AutoComm to synchronize your data in PowerSchool with data in another system, select the **Synchronize Mode** checkbox to perform an AutoComm import. Check with your PowerSchool administrator before using this option. It is a system requirement that you must import at least 20 student records.
Student Schedules	Do the following: • Select **Normal Mode** to import records for the active terms of the current school. **Note**: If no SchoolID is included in the import file, the system defaults to this mode. • Select **Synchronize Mode** if your school uses AutoComm to synchronize your data in PowerSchool with data in another system. When selected, all other Advanced Import Options are unavailable and the system defaults to Normal Mode. Synchronize Mode drops existing section enrollments and imports new enrollments from your import file. For example, if a student is currently enrolled in English during second period and the import file contains a record for that student for Science second period, the system will drop the student's section enrollment for English and import the Science section enrollment. **Note**: This change cannot be undone. If course and section numbers are shared across multiple schools, it is recommended that you include the SchoolID in the import file. If course and section numbers are shared across multiple schools and the SchoolID is not included in the import file, the system will not import the records, and the

	following alert appears, "Not Imported: The import school: ( ) does not match the current school. Skipping Record." **Warning:** Check with your PowerSchool administrator before using this option. • Select **Historical Mode** to import records for any term for the current school. **Note:** This option is not available unless the import files include SchoolID data. • Select **District Mode** to import records for active terms at any school. **Note:** This option is only available when signed in to the district office. • Select **Historical and District Modes** to import records for any terms at any school. **Note:** This option is only available when signed in to the district office.
Teachers	Select the **Update teacher records** checkbox if you want the system to add teacher-related information to existing teacher records in cases where the teacher numbers are the same.
Test Scores	For information about importing test results, see *How to Import PowerSchool Test Scores*.

8. Click **Import**. The Importing [File to Import] page displays the processed records. If a record could not be imported due to an error, the row number of the record along with the reason it could not be imported appears. If a record was successfully imported, the row number of the record along with the action taken appears.

Quick Import for State-Specific Extended Tables

Use the Quick Import for State-Specific Extended Tables function to bring a large amount of data into PowerSchool state-specific extended tables. Before completing this procedure, you must have an ASCII text file that contains the data to import and is preferably delimited by tabs.

How to Import Data Using Quick Import for State-Specific Extended Tables

Note: Verify that you are signed in to the appropriate school. If the school is incorrect, click **School** at the top of the page to choose a new school before starting this procedure.

Note: The Quick Import for State-Specific Extended Tables page is now also accessible via **Start > System > Page and Data Management > Quick Import for State-Specific Extended Tables**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Quick Import for State-Specific Extended Tables**. The Quick Import for State-Specific Extended Tables page appears.
4. Use the following table to enter information in the fields:

Field	Description
Table	Choose the extended table to which the data will be imported from the pop-up menu.
Field Delimiter	Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. • **Tab**: Separates fields with a tab • **Other**: Enter a field delimiter in the blank field, such as a comma
End-of-Line Marker	Choose the end-of-line marker from the pop-up menu. This refers to the item that will separate the records in the exported data. • **CR**: Carriage return • **CRLF**: Carriage return line feed • **LF**: Line feed • **Other**: Enter a delimiter in the blank field

Character Set	Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created: • **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** (Unix)
File to Import	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), navigate to the data file, and click **Open**.
Suggest Field Map	Select the checkbox to have the system suggest into which PowerSchool field each piece of data in the data file is saved. These are just suggestions and can be changed before saving.
School	The name of the school for which you are importing data.

5. Click **Import**. The Import Records into an Extended Table from an ASCII Text File page appears.
6. Use the following table to enter information in the fields:

Field	**Description**
From Your File	The fields of the first record from the import file appear.
To	If you select the **Suggest field map** checkbox on the Quick Import page, the PowerSchool fields suggested for each piece of data imported appear. If you do not select the **Suggest field map** checkbox or you need to change the fields, use the pop-up menu to choose the PowerSchool field into which the system imports the data from the import file.
Check to exclude first row	Do one of the following: • Select the checkbox to prevent importing the header row.

	• Deselect the checkbox to import the first row. This should be used if your import file does not contain a header row.
Update Existing Rows	Do one of the following: • Select the checkbox if you want the system to update existing rows with data from each import. • Deselect the checkbox if you do not want the system to update any row that contains data.
The lines below can be used to assign a constant value to field(s) in all of the imported records.	To enter a new value in a PowerSchool field for all records from the import file, such as entering the same city for all student records in an import file: 1. Enter the value you want to import for all records. 2. Use the pop-up menu to choose the PowerSchool field into which the system imports the value.

7. Enter information in the Advanced Import Options fields.

   Note: Advanced Import Options appear based on the table that was selected from the **Table** pop-up menu.

8. Click **Submit**. The Importing [File to Import] page displays the processed records. If a record could not be imported due to an error, the row number of the record along with the reason it could not be imported appears. If a record was successfully imported, the row number of the record along with the action taken appears.

Templates for Importing

If you often import the same fields of data, you can create a template so that you don't have to define the import parameters and field import map every time you perform an import.

For example, if you often import an update from the school nurse with immunization information, create a template that includes the fields and format for immunization-related fields.

Database Extensions and Import Templates

You can specify any database extension fields on the template.

- Delimiters occurring in the data are not escaped (for example, fields are delimited by tabs, but one field contains tabs) and can cause problems when importing. Data can be wrapped with double quotes to lessen the issue, but there is still data (ex. double quote + tab + double quote) that can cause the same problems.
- Boolean values will be case insensitive, "true/false" or "t/f" or 1/0.

How to Add an Import Template

Create an import template to use each time you import the same data into your PowerSchool system.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Templates for Importing**. The Templates for Importing page appears.
4. Click **New**. The New Import Template page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name of this template	Enter a name for the template.
Import into this table	Choose the **Students**, **Courses**, or **Teachers** table from the pop-up menu. **Note:** If **Courses** does not appear in the pop-up menu, then the district may only allow new courses to be created at the district office. For more information, see *How to Edit Course Settings*.
Delimited or fixed-length?	Choose **Delimited** or **Fixed-field length** for the data format from the pop-up menu.
Field delimiter	If you chose **Delimited**, choose which delimiter to use to separate the fields in the exported data from the pop-up menu:

<table>
<tr><td></td><td>Tab
Comma
Other: Enter the type of field delimiter in the adjacent field.</td></tr>
<tr><td>End-of-line (record) delimiter</td><td>Choose one of the following to determine how the records are separated in the files you import using this template from the pop-up menu:
CR: Carriage return
CRLF: Carriage return/line feed
LF: Line feed
Other: Enter the type of end-of-line delimiter in the adjacent field, such as a semicolon.</td></tr>
<tr><td>Update Mode</td><td>Select the checkbox if you want the data in the file you import to update any fields with existing data. Otherwise, deselect the checkbox.</td></tr>
<tr><td>Columns</td><td> Create a map to determine into which PowerSchool fields each field of information in the import file is saved. Enter the fields in the order they appear in the import file. If you chose Fixed-field length, indicate the width of each column (in characters) and the field name. To separate the number and field name, enter <tab>. For example, if the first column in your fixed width file contains the student's phone number, enter 12<tab>home_phone. If you chose Delimited, enter each field name and press RETURN (Mac) or ENTER (Windows). If you are adding columns for database extensions, enter the extension field name using the format [extension name].[fieldname]. </td></tr>
</table>

6. Click **Submit**. The Templates for Importing page displays the new template.

How to Edit an Import Template

Edit an import template to use each time you import the same data into your PowerSchool system.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Templates for Importing**. The Templates for Importing page appears.
4. Click the name of the template you want to edit. The Edit Import Template page appears.
5. Edit the information as needed. For field descriptions, see *How to Add an Import Template*.
6. Click **Submit**. The Templates for Importing page displays the edited template.

How to Delete an Import Template

Delete import templates when they are no longer needed to conserve space on your system and minimize the possibility of confusion with the templates that are still used.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Templates for Importing**. The Templates for Importing page appears.
4. Click the name of the template you want to delete. The Edit Import Template page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Import Using a Template

When importing data using a template, you match the data with the fields defined in the template. To complete this procedure, you need a data file saved to a local or network location and an import template. For more information about creating an import template, see *How to Add an Import Template*.

Note: The Import Using Template page is now also accessible via **Start > System > Page and Data Management > Import Using Template**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Import Using Template**. The Import Using Template page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Import template	Choose the template to use from the pop-up menu. **Note:** Click template to link to the Templates for Importing page, where you can view, create, edit, and remove templates used for importing.
File to import	Either enter the data file path and name in the field or click **Browse...** to select the data file.

5. Click **Submit**. The Import Check: [data file name] page appears.
6. Verify that the data correlates to the fields from the template. If it doesn't, click the link to modify the template. For more information, see *How to Edit an Import Template*. Otherwise, click **Import**. The Importing: [data file name] page appears, and the data is imported.

How to Export a Template

Export a template used for importing data to save a backup copy of the template. Though you can view and modify the exported template using an application such as a Web browser, the exported template can also be sent to a system outside of your PowerSchool system.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Templates for Importing**. The Templates for Importing page appears.
4. Click the name of the template to be exported in the Template Name column. The Edit Import Template page appears.
5. Click **Export this template**. The File Download dialog appears.
6. Select **Save File As...** or **Save this file to disk**. The Save or Save As dialog appears.

7. Select a file location.
8. Click **Save**. The template saves to the selected location.

AutoComm Setup

Use AutoComm to synchronize the data in PowerSchool with that in another system, such as a mainframe system. To synchronize your data, set up intervals at which PowerSchool automatically imports files of data from the other system.

To use AutoComm, create an AutoComm record where you determine the synchronization parameters for each of the following files:

- Courses
- Teachers
- Sections
- Students
- Student schedules

Note: When importing multiple section records, the sections' expressions as defined by your school are required. An expression is the combination of the periods and days in which the section meets. Though PowerSchool creates internal values for periods and days, you should import the actual values that you want to appear when the system displays expressions. An invalid expression causes an error for that record, which results in the record not being imported.

How to Add an AutoComm Record

PowerSchool uses the parameters that you define for the record on this page to import the appropriate data at the dates and times you specify.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoComm Setup**. The AutoComm Setup page appears.
3. Click **New**. The AutoComm Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of this record.

Table to Import	Use the pop-up menu to choose the table into which you are importing data with this record: • **Attendance** • **Students** • **Courses** • **Sections** • **Student schedules** • **Teachers** **Note:** The Attendance Recording Methods choices made on the Attendance Preferences page affect the Attendance table options.
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically import data. **Note:** If the minutes are 00, AutoComm will run after the Hourly Process has completed—not specifically on the hour stated, but within that hour.
Days to Execute	Enter the days of the week you want the system to import records. Starting with Monday, use the following abbreviations for the days of the week: **MTWHFSU**.
Turn Execution Off	Do one of the following: • Select the checkbox to stop the system from automatically importing data. • Deselect the checkbox to turn AutoComm on.
Get Input From	Indicate the method by which you want to import the records from the other system from the pop-up menu. To use a local (or network shared file system) to import the records from the other system: 1. Choose **Local (or network shared) File System**. To use the file transfer protocol (FTP) to import the records from the other system:

	1. Choose **Ad Hoc FTP Server**. 2. Enter information in the following fields: • **Use Passive Mode** - If your FTP has difficulty transferring, select the checkbox. • **FTP host name** • **FTP account name** • **FTP password** • **Timeout in seconds** - Indicates the number of second that PowerSchool will try to make the initial FTP connection with the remote system. To use a managed connection, such as SFTP, to import the records from the other system: 1. Choose **Managed Connection.** A second pop-up menu appears. 2. Choose a managed connection from the pop-up menu. **Note:** Managed Connections only appears in the pop-up if configured and download capability is enabled. See **System > System Settings > Plugin Management > Remote Connection Manager**.
Path	Enter the path to the folder of the file on your computer or network. If using PowerSchool on a single node, the path needs to be defined as being from the root; if using a server array, only the file name should be used and never the path, since there is only one location for AutoComm files to be located on a server array.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the import file: • **Tab** • **Comma**

<table>
<tr><td>Record Delimiter</td><td>Use the pop-up menu to choose how records are separated in the import file. This selection is specific to the operating system where the import file was created:
CRLF: Carriage return, line feed (Windows)
CR: Carriage return (Mac)
LF: Line feed (Unix)</td></tr>
<tr><td>Character Set</td><td>Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created:
Windows ANSI (Windows)
Mac Roman (Mac)
ISO 8859-1 (Unix)
UTF-8</td></tr>
<tr><td>Sort Order</td><td>Enter the order that this record appears on the AutoComm Setup page.

If you do not make a selection, the order will be alphabetical by the name of the AutoComm record.</td></tr>
<tr><td>Update existing records with imported data (when applicable)</td><td>Do one of the following:
Select the checkbox if you want the system to update existing student records with data from each import. The system updates blank fields within records and creates new records for those that do not exist.
Deselect the checkbox if you do not want the system to update any record that contains data.</td></tr>
<tr><td>Mark students and their schedules inactive when their exit date is <= today.</td><td>If you want the system to automatically import a student record as inactive if the student's exit date is earlier than today, select the checkbox. Otherwise, deselect the checkbox.</td></tr>
</table>

<table>
<tr><td>First record of file is number_of_records=</td><td>The system does not import the file if the number of records in it does not match the number given in the first record of the file. It is recommended that you select the checkbox.</td></tr>
<tr><td>E-Mail completion report to</td><td>Enter the email addresses of the people you want the system to send a completion report to each time it imports this file. Separate multiple addresses with commas.</td></tr>
<tr><td>PowerSchool fields to import into</td><td>Enter the PowerSchool fields in which the system saves each value in the import file. After you enter each field code, press RETURN (Mac) or ENTER (Windows).

To insert a PowerSchool field into this field:

1. Click Student Field List to view a list of PowerSchool student fields. The Student Field List pop-up appears.
2. To narrow the list of fields, enter one of more search terms in the Filter field. Otherwise, leave blank.
3. Click the field you want to add. The Student Field List pop-up closes, and the selected field appears.

Importing to the Attendance table requires some specific field names: Daily Attendance

• Student_Number
• Att_Date
• Schoolid
• Attendance_CodeID

Meeting Attendance

• Student_Number
• Att_Date
• Course_Number
• Section_Number
• Schoolid
• Attendance_CodeID

Note: When creating the import file, remove the column headings; only record data should be in the file. Create the file in Excel and save it as a tab- delimited file. The data in the file should</td></tr>
</table>

	be in the same order as the field names listed in the AutoComm Record. **Note:** If you are adding database extension fields, enter the extension field name using the format [extension name].[fieldname].
Duplicate this AutoComm record to all schools on this server	If you are creating this record for the first time, select the checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect the checkbox. **Note:** If working in the District mode, you can modify only the Students and Teachers tables.

5. Click **Submit**. The AutoComm Setup page displays the new record.

How to Edit an AutoComm Record

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoComm Setup**. The AutoComm Setup page appears.
3. Click the name of the AutoComm record you want to edit. The AutoComm Record page appears.
4. Edit this information as needed. For field descriptions, see *How to Add an AutoComm Record*.
5. Click **Submit**. The AutoComm Setup page displays the edited record.

How to Delete an AutoComm Record

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoComm Setup**. The AutoComm Setup page appears.
3. Click the name of the AutoComm record you want to delete. The AutoComm Record page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Manually Run an AutoComm Record

Manually run an AutoComm record to avoid waiting for the process to automatically run on the specified day and time.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoComm Setup**. The AutoComm Setup page appears.
3. Click **Run Now**. The AutoComm record runs, and the AutoComm Setup page appears. If an email address is specified in the "E-Mail completion report to" field, the system emails the recipient the status of the AutoComm process.

Data Import Manager

Using the Data Import Manager, you can quickly and easily import data from a text file into PowerSchool.

Note: Currently data may only be imported into a limited number of pre-defined and Custom Table data sets. Additional data sets will be made available in future releases.

Set Page-Level Permissions

To ensure that only authorized staff members access the data import pages, set page-level permissions for **Start Page > Special Functions** under Functions in the main menu **> Importing & Exporting > Data Import Manager** under Importing. For more information about setting page-level permissions, see *Security Permissions*.

Preparing Your Import File

General Information

Before importing data, you will need to create an import file. When creating your import file, it is important to note the following:

- Do not use a double quote (") as the field delimiter.
- The double quote is a reserved character and may only be used to ignore other delimiters.
- Field delimiters are regarded as literals if the field value is surrounded by double quotes.
- Strings are regarded as literals if surrounded by double quotes.
- Double quotes that are surrounded by double quotes are regarded as part of the value.

Example 1

Field delimiter as a literal in the field value:

First Name, Last Name, Address
John, Smith, "123 Anyplace Dr, Ste 100"

Results:

FirstName	LastName	Address
John	Smith	123 Anyplace Dr, Ste 100

Example 2

Field delimiter as a literal in the field value surrounded by double quotes:

First Name, Last Name, Address
John, Smith, """123 Anyplace Dr, Ste 100"""

Results:

FirstName	LastName	Address
John	Smith	"123 Anyplace Dr, Ste 100"

Example 3

Double quotes used to escape a field delimiter:

First Name, Last Name, Address
John, Smith, 123 Anyplace Dr"," Ste 100

Produces the following results:

FirstName	LastName	Address
John	Smith	123 Anyplace Dr, Ste 100

Example 4

Quote within a field value:

First Name, Last Name, Address
John, Smith, 123 Anyplace """Dr,""" Ste 100

Produces the following results:

FirstName	LastName	Address
John	Smith	123 Anyplace "Dr," Ste 100

Example 5

Without the double quotes, the field delimiter is not escaped:

First Name, Last Name, Address
John, Smith, 123 Anyplace Dr, Ste 100

Produces the following results:

FirstName	LastName	Address	
John	Smith	123 Anyplace Dr	Ste 100

Importing Contacts

The Contacts module provides the ability to import a contact along with associated addresses, phone numbers, email addresses, and students. In order to associate more than one of any child record, multiple related rows are included in the import file. An identifier value is required for each row. Specifying the same identifier value on multiple rows indicates that the rows are related. Some fields have rules regarding what is a valid value (dates, booleans, code sets). An invalid value may cause a single row or multi-row import to fail. Multi-row imports have additional checks for duplicates and conflicting values. Below are rules for duplicates and conflicts for each entity. Duplicates are ignored during the import, while conflicts are rejected with appropriate error messages. When processing multiple related rows, the import process rejects all related rows if any of the rows have an error. The Import Results page displays applicable error messages for each failed row.

General

Entity	Rule
Boolean Flags	When specified, the values of 0, false, f, no, and n indicate false. 1, true, t, yes and y indicate true. Anything else is an error. Not case sensitive.
Code Set Values	When a code set value is specified, it must be a case-insensitive match to an actual code in the database for the applicable code type.
Dates	When specified, the date must be in either mm/dd/yyyy or mm/dd/yy format. Any date values not in that format result in an error.
Blanks	All Boolean flags and code set values have default values that are applied if no value is specified. In the case of Boolean flags, this can lead to conflicts if one related row specifies a non-default value and the other related row does not specify the corresponding column.

Contact (Person Table)

Entity	Rule
Last Name	Required on at least one related row. An error occurs if multiple rows have values that conflict with each other.

Prefix Suffix Gender	Code set values. Defaults to not set, if not specified. If the value is set to a specific value, it can be included on any related row. Specifying on multiple related rows is okay, as they are a case-insensitive match.
IsActive	Boolean flag. Defaults “true” if not specified. Conflict will arise if “false” is specified on one row and either, “true” or blank is specified on another related row.
First Name Middle Name Employer State Contact Number	Same rules as Last Name, except they are not required.

Email Address (EmailAddress and PersonEmailAddressAssoc Tables)

Entity	Rule
Email Address	Required if an email address is to be imported. Must be a valid email address format (somebody@example.com). Same email address (case-insensitive) cannot be included on two related rows unless the type and IsPrimary values are also specified with the same value which indicates a duplicate.
Email Type	Code set value. Defaults to not set, if not specified.
IsPrimary	Boolean flag. Defaults to false, if not specified. A contact can only have one primary email address so related rows with more than one true IsPrimary value will be rejected except in the case of a duplicate.

Phone Number (PhoneNumber and PersonPhoneNumberAssoc Tables)

Entity	Rule
Phone Number (as entered)	Required if a phone number is to be imported. Format is open, but it should not include extension mark up, such as 212-555-1234 x123. Extensions should be entered into the “Extension”

	field. They will be dropped if included in the Phone Number (as entered) field. The same phone number can be entered multiple times with differing types and priority order values. Note that while the format is open, it will still honor any defined Limited Data Validation (LDV) rules.
Extension	Optional extension value. Same phone number with different extension makes it unique.
Phone Type Code	Code set value. Defaults to not set, if not specified.
Phone Number Priority Order	Must be a positive integer if specified. Cannot use the same value more than once for related rows unless it is a duplicate. If not specified, a default value will be set. The default value is based on the order of appearance in the file and any phone number priority order values specified on related rows. For example, if four related rows include distinct phone numbers and two of them specify priority orders of 1 and 3, the first one that didn't specify would be assigned two and the other would be assigned 4.
IsSMS	Boolean flag. Defaults to false, if not specified. If it is specified and the phone number already exists (on another contact), the existing phone number’s IsSMS flag will be updated to the specified value.
IsPreferred	Boolean flag. Defaults to false, if not specified. Conflict will arise if true is specified on one row and either false or blank is specified on another related row.

Address (Address and PersonAddressAssoc Tables)

Entity	**Rule**
Street	Required if an address is to be imported. Every field except for address type must match in order to be considered a duplicate. Any other deviation of values on related rows is considered a new address. If it is a duplicate and priority order does not match, the row is rejected.

Line Two Unit City Postal Code	Optional text values.
Geocode Latitude Geocode Longitude	Optional decimal values. Must be greater than zero if specified. No validation against physical address is performed.
State	Code set value. Defaults to not set, if not specified,
Address Type	Code set value. Defaults to not set, if not specified.
Address Start Date Address End Date	Optional date values. Must be in valid date format if specified. Start date cannot be after end date if both are specified.

Contact Student (StudentContactAssoc and StudentContactDetail Tables)

Entity	Rule
Student Number	Must be specified if a contact student relationship is to be imported. If same student number appears on multiple lines, non-overlapping start and end dates must be specified. Student number must match an existing Students record in the database and student must be at current school unless the import is being performed at the district office. It is considered a duplicate if all other values are the same.
Original Contact Type	Indicates that the contact is one of the six legacy contact types. Valid values are mother, father, guardian, emergency1, emergency2 and emergency3. Note that a student may only have one contact of each original contact type. Therefore, an imported row will fail if a student already has a contact of the specified original contact type or if the same original contact type is assigned to a student for multiple contacts that are being imported.
Relationship Type	Code set value. Defaults to not set, if not specified.
Relationship Note	Optional text value.

Relationship Start Date Relationship End Date	Optional date values. Must be in valid date format if specified. Start date cannot be after end date if both are specified. If multiple related rows contain the same student number, none of the related date ranges can have any overlapping dates. Null start date means beginning of time and null end date means the end of time for the purposes of comparing date ranges.
Contact Has Custody Contact Lives With Contact Allow School Pickup Is Emergency Contact Contact Receives Mailings	Boolean flags. All default to false, if not specified. A conflict will arise if a related row specifies true and another specifies false or is blank.

Importing Incidents

PowerSchool's Incident Management schema spans several complex tables that would otherwise require multiple separate imports to create a single incident. The incident data set in the Data Import Manager allows administrators to import incident records using a flat file import. The flat-file information is translated behind the scenes to fit the actual tables used for incident records.

A single incident can include multiple attributes, participants, actions, objects, or behaviors. As such, the incident import data set allows these column groups to be repeated in your import file to represent multiple groupings of the above items.

Incident Element Hierarchy

Within the incident element hierarchy, elements are categorized as a parent, sibling, or child element. Parent and sibling elements can be listed in any order. Child elements must be listed after a parent element in order for the fields to be valid.

- Incident
    - Incident_Attribute
    - Action
        - Action_Attribute
    - Object
    - Behavior
    - Participant

- Participant_Attribute
- Participant_Role
    - Participant_Object
    - Participant_Action
        - Participant_Action_Attribute
    - Participant_Behavior
        - Participant_Behavior_Action
            - Participant_Behavior_Action_Attribute

Data Element	Description
Incident	When creating your incident import file, you may include the following data (based on your PowerSchool incident management setup) for each incident you are importing: • Incident_ID • Incident_School_Number • Incident_Title • Incident_Description • Incident_Prepared_By • Incident_Incident_Type • Incident_Incident_Date • Incident_Incident_Time • Incident_Time_Frame_Code • Incident_Time_Frame_Subcode • Incident_Time_Frame_Comment • Incident_Financial_Impact • Incident_Location_Code • Incident_Location_Subcode • Incident_Location_Description **Note:** If Incident_School_Number is mapped, then the incident is associated with the mapped school or district office. If Incident_School_Number is not mapped, then the incident is associated with the current school. **Note:** For field descriptions, see *Incident Management*. When importing, these fields may only

	be mapped once. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Incident_Attribute	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each incident attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Incident_Attribute_Code • Incident_Attribute_Subcode (required if code is divided into sub codes) • Incident_Attribute_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Action	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each action in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Action_Code • Action_Subcode (required if code is divided into sub codes) • Action_Comment (may be forbidden, allowed or required based on configuration) • Action_Begin_Date • Action_End_Date • Action Taken Detail • Actual_Resolution_Date • Action_Duration_Code • Action_Duration_Subcode (required if code is divided into sub codes)

	• Action_Duration_Comment (may be forbidden, allowed or required based on configuration) • Action_Assigned_Duration • Action_Actual_Duration • Action_Duration_Notes • Action_Change_Reason • Action_Change_Code • Action_Change_Subcode (required if Action Change Code is broken into sub codes) • Action_Change_Comment (may be forbidden, allowed or required based on action change code configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Action_Attribute	Within the incident import file, these fields must be listed after an Action in order for the fields to be valid. For each action attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Action_Attribute_Code • Action_Attribute_Subcode (required if code is divided into sub codes) • Action_Attribute_Comment (may be forbidden, allowed or required based on configuration) • Action_Attribute_Value (content of value field depends on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.

Object	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each object in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Object_Code • Object_Subcode (required if code is divided into sub codes) • Object_Comment (may be forbidden, allowed or required based on configuration) • Object_Description • Object_Quantity **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Behavior	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each behavior in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Behavior_Code • Behavior_Subcode (required if code is divided into sub codes) • Behavior_Subcode_2 (required if sub codes is divided into sub codes) • Behavior_Subcode_3 (required if sub codes is divided into sub codes) • Behavior_Subcode_4 (required if sub codes is divided into sub codes) • Behavior_Comment (may be forbidden, allowed or required based on configuration) • Behavior_Primary (use value Primary or leave blank)

	Note: For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each participant in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Student_Number (cannot be populated if Teacher_Number is also populated) • Participant_Teacher_Number (cannot be populated if Student_Number is also populated) • Participant_Unknown (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_First (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Middle (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Last (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Position (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Age (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Gender (cannot be populated if Student_Number or Teacher_Number is also populated)

	Note: For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Attribute	Within the incident import file, these fields must be listed after a Participant in order for the fields to be valid. For each participant attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Attribute_Code • Participant_Attribute_Subcode (required if code is divided into sub codes) • Participant_Attribute_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Role	Within the incident import file, these fields must be listed after a Participant in order for the fields to be valid. For each participant role in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Role_Code (required if preceded by Participant) • Participant_Role_Subcode (required if code is divided into sub codes) • Participant_Role_Comment (may be forbidden, allowed or required based on configuration)

	Note: For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Particpant_Object	Within the incident import file, these fields must be listed after a Participant_Role in order for the fields to be valid. For each participant object in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Object_Code • Participant_Object_Subcode (required if code is divided into sub codes) • Participant_Object_Comment (may be forbidden, allowed or required based on configuration) • Participant_Object_Description • Participant_Object_Quantity **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Action	Within the incident import file, these fields must be listed after a Participant_Role in order for the fields to be valid. For each participant action in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Action_Code • Participant_Action_Subcode (required if code is divided into sub codes) • Participant_Action_Comment (may be forbidden, allowed or required based on configuration) • Participant_Action_Begin_Date

	• Participant_Action_End_Date • Participant_Action_Taken_Detail • Participant_Actual_Resolution_Date • Participant_Action_Duration_Code • Participant_Action_Duration_Subcode (required if code is divided into sub codes) • Participant_Action_Duration_Comment (may be forbidden, allowed or required based on configuration) • Participant_Assigned_Duration • Participant_Actual_Duration • Participant_Duration_Notes • Participant_Action_Change_Reason • Participant_Action_Change_Code • Participant_Action_Change_Subcode (required if code is divided into sub codes) • Participant_Action_Change_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Action_Attribute	Within the incident import file, these fields must be listed after a Participant_Action in order for the fields to be valid. For each participant action attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Action_Attribute_Code • Participant_Action_Attribute_Subcode (required if code is divided into sub codes) • Participant_Action_Attribute_Comment (may be forbidden, allowed or required based on configuration)

	• Participant_Action_Attribute_Value (content of value field depends on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Behavior	Within the incident import file, these fields must be listed after a Participant_Role in order for the fields to be valid. For each participant behavior in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Behavior_Code • Participant_Behavior_Subcode (required if code is divided into sub codes) • Participant_Behavior_Subcode_2 (required if sub codes is divided into sub codes) • Participant_Behavior_Subcode_3 (required if sub codes is divided into sub codes) • Participant_Behavior_Subcode_4 (required if sub codes is divided into sub codes) • Participant_Behavior_Comment (may be forbidden, allowed or required based on configuration) • Participant_Behavior_Primary (use value Primary or leave blank) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Behavior_Action	Within the incident import file, these fields must be listed after a Participant_Behavior in order for the fields to be valid. For each participant behavior

	action in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Behavior_Action_Code • Participant_Behavior_Action_Subcode (required if code is divided into sub codes) • Participant_Behavior_Action_Comment (may be forbidden, allowed or required based on configuration) • Participant_Behavior_Action_Begin_Date • Participant_Behavior_Action_End_Date • Participant_Behavior_Action_Taken_Detail • Participant_Behavior_Action_Actual_Resolution_Date • Participant_Behavior_Action_Duration_Code • Participant_Behavior_Action_Duration_Subcode (required if code is divided into sub codes) • Participant_Behavior_Action_Duration_Comment (may be forbidden, allowed or required based on configuration) • Participant_Behavior_Action_Assigned_Duration • Participant_Behavior_Action_Actual_Duration • Participant_Behavior_Action_Duration_Notes • Participant_Behavior_Action_Change_Reason • Participant_Behavior_Action_Change_Code • Participant_Behavior_Action_Change_Subcode (required if code is divided into sub codes) • Participant_Behavior_Action_Change_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.

Participant_Behavior_Action_Attribute	Within the incident import file, these fields must be listed after a Participant_Behavior_Action in order for the fields to be valid. For each participant behavior action attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Behavior_Action_Attribute_Code • Participant_Behavior_Action_Attribute_Subcode (required if code is divided into sub codes) • Participant_Behavior_Action_Attribute_Comment (may be forbidden, allowed or required based on configuration) • Participant_Behavior_Action_Attribute_Value (content of value field depends on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.

Importing Custom Tables

The Data Import Manager allows administrators to import data into custom tables. These tables are not part of the core PowerSchool schema, but are created by PowerSchool custom development groups.

- Custom Tables are listed in the Import Into pop-up menu on the Data Import Manager page using the name of the custom table.
- Custom table fields are available for select data sets in the Data Import Manager when mapping fields from the import file to PowerSchool.
    - If the custom table is a 1-to-1 child table, administrators must map one of the fields in the import file to the foreign key field in the custom table.
    - If the custom table is a 1-to-many child table, administrators must map one of the fields in the import file to the foreign key field in the custom table when adding child records.
    - When updating existing records in the custom table, administrators must map one of the fields in the import file to the primary key field. The foreign

key field is ignored if the primary key field is mapped and present for the record. This means that it is not possible to update a foreign key value.
    - If the custom table is a stand-alone table that does not have a parent table, administrators must map one of the fields in the import file to the primary key field only when attempting to update an existing record.
- When mapping custom table fields, the fields appear in the following order:
    - If the custom table is a 1-to-1 extension of a core table, after the last core field within the import module, the foreign key to the parent table appears first and then all the other custom table fields appear in alphabetical order.
    - If the custom table is a 1-to-many child extension of a core table, after the core table, the custom child table fields are grouped and appear in alphabetical order. The foreign key to the parent table appears first, the primary key appears second, and then all the other custom table fields appear in alphabetical order.
    - If the custom table is a stand-alone table that does not have a parent table, the primary key appears first and then all the other custom table fields appear in alphabetical order.
- Standard import options are available when importing into a custom table.
    - Administrators can choose whether or not to exclude the first row if it contains headers.
    - Administrators can choose whether or not to update existing records if a match is found.
- Data being imported into a custom table will be validated based on the data type and other field attributes. Data types include:
    - Text must be a text value less than or equal to the database field's length property.
    - Integer must be a whole number less than or equal to 19 digits long.
    - Double must be a numeric value with up to one decimal point and be less than or equal 19 digits long.
    - Boolean must be a numeric value of 0 or 1.
    - Date must be a valid m/d/y format where m can be 1-12, d can be 1-31 and y can be two digits (05) or four digits (2005).
- Import results for an import into a custom table are displayed in the Import Results page.

Import Data Using the Data Import Manager

Once you have prepared your import file, you can import the data using the Data Import Manager.

How to Import Data Using the Data Import Manager

Note: Verify that you are signed in to the appropriate school. If the school is incorrect, click **School** at the top of the page to choose a new school before starting this procedure.

Note: The Data Import Manager page is now also accessible via **Start > System > Page and Data Management > Data Import Manager**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manager**. The Data Import Manager page appears.
4. Use the following table to enter information in the Select Source and Target fields:

Field	Description
Source	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), navigate to the data file, and click **Open**.
Import Into	Indicate which data set you want to import the data into by choosing one of the following from the pop-up menu: • **Contacts** • **Course Archive** • **Course Equivalency** • **Incident** • **[Custom Table]** • **Student Email** • **Transportation** **Note:** Custom tables only appear if your district allows importing into custom tables at the school level.
Field Delimiter	Use the pop-up menu to choose which delimiter to use to separate the fields in the exported data from the pop-up menu: • **Tab** • **Comma** • **Other**: Enter the field delimiter in the adjacent field. **Note**: Adjacent field only appears editable if **Other** is selected.

	Note: Only one character may be entered. A double quote character is not allowed. **Note:** This field only appears if applicable to the **Import Into** selection.
Character Set	Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created: • **Unicode** • **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** (Unix) **Note:** This field only appears if applicable to the **Import Into** selection.

5. Click **Next** or the **Map Columns** header.

   Note: The **Next** button and the **Map Columns** header appear shaded until the **Source** and **Import Into** are populated.

6. Use the following table to enter information in the Map Columns fields:

Field	**Description**
Select Template	To apply a template: 1. Click **Select Template**. The Select Import Template pop-up appears. 2. Select the template you want to apply. 3. Note the mapped fields that are included in the template appear in the lower portion of the pop-up. 4. Click **Apply**. The Select Import Template pop-up closes. To delete a template: 1. Click **Select Template**. The Select Import Template pop-up appears.

	2. Select the template you want to delete. 3. Click **Delete**. 4. Click **Confirm Delete**. A confirmation message appears. 5. Click **Close**. The Select Import Template pop-up closes. **Note:** If no templates have been saved, this button appears disabled. **Note:** Click column headings to sort templates in ascending order. Click again to sort in descending order.
Import File Column	This section displays the fields from the import file.
PowerSchool Field	This section displays the suggested PowerSchool field for each field from the import file. To map a field from the import file, choose a PowerSchool field from the pop-up menu. **Student Email** For Student Email, only Student Number and Email appear mapped. Student Number is required for importing Student Emails. All other imported fields appear blank. **Incident** Primary fields in the Incident data set may only be mapped once. Secondary fields may be mapped one or more times. For more information, see the *Incident Import File* section under *Preparing Your Import File*.
Save Template	If you import the same fields of data frequently, you can create a template so that you don't have to define the field import map every time you perform an import. To create a new template: 1. Click **Save Template**. The Save Template pop-up appears. 2. Enter the name of the template. 3. Enter a description of the template. 4. Note the mapped fields that are included in the template. 5. Click **Save as New**. The Save Template pop-up closes, and a confirmation message appears.

	To edit a template: 1. Click **Save Template**. The Save Template pop-up appears. 2. Edit the description of the template. 3. Note the mapped fields that are included in the template. 4. Click **Save**. The Save Template pop-up closes, and a confirmation message appears.

7. Click **Next** or the **Select Options** header.

   Note: The **Next** button and the Select Options header appear shaded until at least one column is mapped, an identifier (required field) is mapped, and the same primary column is not mapped more than once.

8. Use the following table to enter information in the Select Options fields:

Field	Description
Check to exclude the first row.	Do one of the following: • Select the checkbox to prevent importing the header row. • Deselect the checkbox to import the first row. This should be used if your import file does not contain a header row. **Note:** If one or more columns are auto-mapped, the checkbox is automatically selected. If no columns are auto-mapped, the checkbox is not automatically selected.
If a record in the import file matches an existing record in the database, how would you like that record processed?	If you are importing to the Student Email table, select one of the following options to determine what you want the system to do when a student record in the import file contains a student ID number that already exists in PowerSchool: • If you do not want the system to import any record with a student number that already exists, select **Do not process that record from the import file**. • If you want the system to update the matching student's record with the data in the import file, select **Update the**

	existing record with information from the file being imported. **Note:** This field does not appear if you are importing to the Incident table.
Check to confirm that records should be deleted if blank rows exist in the import file. All columns in a table must be present in the import file.	Check to confirm that all data in a given column should be deleted if blank records exist for all rows in the import file for that column. All columns in a table must be present in the import file. Do one of the following: • Select the checkbox to confirm the deletion of all data in the specified column. • Deselect the checkbox to retain all data in the specified column.

9. Click **Import**. The Import Results page displays a summary of the processed records:

Field	**Description**
Refresh	Click to update the status of the report. To set the automatic page refresh: 1. On the **Refresh** button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes. 2. Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection. 3. To cancel the automatic page refresh, click the arrow and select the **Cancel** button.

<table>
<tr><td>Processed # out of # records</td><td>The first number represents the number of records processed. The second number represents the total number of records in the import file including the header row.</td></tr>
<tr><td>Failed</td><td>Incident

If a record could not be imported due to an error, the row number of the record along with one of the following reasons appear:
<code type> sub_code specified without code
Returned if a sub_code was specified without a parent code.
<code type> comment specified without code
Returned if a comment was specified without a parent code.
Invalid <code type> code
Returned if the specified code is not valid.
Specified <code type> code does not allow sub_codes
Returned if a sub_code is specified for a parent code that is not split into sub_codes.
Specified <code type> sub_code1 does not allow sub_codes
Returned if a sub_code is specified for a parent sub_code that is not split into sub_codes.
Specified <code type> sub_code2 does not allow sub_codes
Returned if a sub_code is specified for a parent sub_code that is not split into sub_codes.
Specified <code type> sub_code3 does not allow sub_codes
Returned if a sub_code is specified for a parent sub_code that is not split into sub_codes.
Invalid <code type> sub_code
Returned if the specified sub_code is not defined for the parent code.
Invalid <code type> sub_code1
Returned if the specified sub_code is not defined for the parent sub_code.
Invalid <code type> sub_code2
Returned if the specified sub_code is not defined for the parent sub_code.</td></tr>
</table>

	• **Invalid <code type> sub_code3** Returned if the specified sub_code is not defined for the parent sub_code. • **Invalid <code type> sub_code4** Returned if the specified sub_code is not defined for the parent sub_code. • **<code type> comment is not allowed** Returned if a comment was specified but is not allowed for the specified code or sub_code. • **<code type> comment is required** Returned if a comment was not specified but is required for the specified code or sub_code. • **<code type> primary must be primary must be True, False, 1, 0 or Primary** Returned if the specified primary attribute is not valid. • **Multiple <code type> were specified as primary** Returned if the more than one code was specified as primary. • **<code type> code requires sub_code** Returned if the specified code is split into sub_codes and no sub_code was specified. • **<code type> sub_code1 requires sub_code** Returned if the specified sub_code is split into sub_codes and no sub_code was specified. • **<code type> sub_code2 requires sub_code** Returned if the specified sub_code is split into sub_codes and no sub_code was specified. • **<code type> sub_code3 requires sub_code** Returned if the specified sub_code is split into sub_codes and no sub_code was specified. **Note:** The <code type> portion of the message will be replaced by the applicable code type that had the error. In addition to the above errors, a record may not be imported due to a data validation error. If a data validation error occurs, "[field name]: " appears along with one or more of the following explanations: • **Empty value is not allowed** • **Value may not contain more than [#] character(s)**

	• **Value must be a number** • **Value must be a valid date** • **Value must be an integer** • **Value must be at least [#]** • **Value must be less than or equal to [#]** • **Value must be on or after [date]** • **Value must be on or before [date]** • **Value must contain at least [#] character(s)** **Student Email** If a record could not be imported due to an error, the row number of the record along with one of the following reasons appear: • **Email already exists** • **Student not found** • **Student number not found** **Note:** Click column heading to sort in ascending order. Click again to sort in descending order.
Imported	If a record was successfully imported, the row number of the record along with one of the following results appears indicating whether an imported record was cleared, added, ignored, or updated during the import: • Deleted • Inserted • Skipped • Updated **Note:** Click column heading to sort in ascending order. Click again to sort in descending order.
Download Failed Records	Click to download the failed records. Downloaded file appears in the format of the original import file. This can be used to easily identify which records had problems during import so that corrections can be made, and the import can be reattempted. **Note:** This button is only available once the import process has completed.

Data Import Queue

Use the Data Import Queue to view the results of import jobs that you have submitted using the Data Import Manager. When you submit an import request to the system, the system captures the import request and transmits the job to the Data Import Queue. The Data Import Queue page displays the status of the import job as it is processed by the system.

How to Use the Data Import Queue

Note: The Data Import Queue page is now also accessible via **Start > System > Page and Data Management > Data Import Queue**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Queue**. The Data Import Queue page appears.
4. Use the following table to enter information in the fields:

Field	Description
Refresh	Click to update the status of the queue. To set the automatic page refresh: 1. On the **Refresh** button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes. 2. Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection. 3. To cancel the automatic page refresh, click the arrow and select the **Cancel** button.
Import File	The name of the imported file.
Import Into	The data set being imported into.

School	The name of the school for which the file was imported.
Start Date/Time	The date and time the import started appears.
End Date/Time	The date and time the import ended appears. **Note:** This field only displays when the import has completed.
Status	The status of the import appears: • In progress • Complete • Complete with some failures Click to view the Import Results page.
Delete	Click to delete the import.

View Imported Data

Once you imported data, you can then view the imported the data using the appropriate PowerSchool page.

How to View Imported Course By Year Data

Navigate to the View Course Information By Year page for a selected course. For more information, see *How to Edit Course Information*.

How to View Imported Incident Data

Navigate to the Incident Detail page for a selected student. For more information, see *How to Edit a Discipline Incident*.

How to View Imported Student Email Data

Navigate to the Student Email / Email Configuration page for a selected student. For more information, see *How to Configure Student Email*.

How to View Imported Transportation Data

Navigate to the Transportation Entry page for a selected student. For more information, see *How to Edit Transportation Information*.

Export

Quick Export

This method quickly produces a simple list of students and information from the Student table. Change the parameters to produce a more detailed list. For more information about exporting, see *How to Export Using a Template*.

In addition to exporting data, SIS Views provide quick access to key metrics and not just raw data. For detailed information, see the *Data Dictionary SIS Views* available on PowerSource.

How to Use Quick Export

Note: The Quick Export page is now also accessible via **Start > System > Page and Data Management > Quick Export**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Quick Export**. In most cases, you will not need to change the default options on the Export Students page, in which case you can skip the next step. To change the selections, proceed to the next step.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
[Fields to be Exported]	Enter the fields to be included on the exported spreadsheet. Enter as many fields as needed. Enter only one field per line. Separate multiple fields with a hard return. To insert a PowerSchool field into this field: 1. Click **Fields** at the bottom of the page to view a list of PowerSchool fields. The Fields pop-up appears.

	2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears. **Note:** Database extension fields can be selected on the **Fields** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.
Field Delimiter	A field delimiter separates fields (or "columns") in the exported data. Use the pop-up menu to choose how you want the system to separate each field in the export file: • **Tab** • **Comma** • **None** • **Other**: Enter the delimiter in the blank field.
Record Delimiter	A record delimiter separates records (or "rows") in the exported data. Use the pop-up menu to choose how you want the system to separate each record in the export file: • **CR**: Carriage return • **CRLF**: Carriage return and line feed • **LF**: Line feed • **Other**: Enter the delimiter in the blank field.
Surround Fields	Select the checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select the checkbox to include column titles on the first row of the exported data.
Export DCID	Select the checkbox to export the Student table's unique identifier.

5. Click **Submit**. The exported data appears.

6. Choose **File > Save As...** to save the file. Open the saved file using a spreadsheet application, such as Excel or Lotus 1-2-3. Format, print, and save it as any other spreadsheet document.

Templates for Exporting

Export information by using a template. Select the template from a list or create a new one. For more information about exporting, see *Quick Export*.

Database Extensions and Export Templates

Users can add table extension fields to export templates created for the selected table using the following methods for the Data to Export field:

- For Student and Users tables, click **Fields** and select from the pop-up.
- For Courses, Historical Grades, and Student Schedules tables, enter the database extension field name manually.

How to Create an Export Template

If there is no template that you can use to perform the export or no template you can edit to meet your needs, you must create a new one.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.

6. Click **New**. The New Export Template page appears.
7. Use the following table to enter information in the fields:

Field	Description
Name of this template	Enter a name for the template.
Export from this table	Choose the table that will be used in the export from the pop-up menu.
Delimited or fixed-field length?	Choose either **Delimited** or **Fixed** from the pop-up menu to determine the length of each field.
Field delimiter	If you chose **Delimited** in the previous field, use the pop-up menu to choose the field delimiter. This refers to the item that will separate the fields in the exported data. If you choose **Other**, enter the delimiter in the blank field. Select the checkbox to surround field values with quotation marks.
End-of-line (record) delimiter	Choose the delimiter for the end of each record from the pop-up menu. For **Other:**, enter the delimiter in the blank field.
Column Titles	Select the checkbox to put column titles on the first row.
Mime Type	Enter a MIME type. To use the default MIME type, leave the field blank. For more information, see *MIME Types*.

8. Click **Submit**. The Templates for Exporting page displays the new template. Add columns to the template using the procedure *How to Add Template Columns*.

How to Add Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for

Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click **New** to add a column to the template. The New Column page appears.
8. Use the following table to enter information in the fields:

Field	**Description**
Title/Heading	Enter a title for the column.
Data to Export	Enter the fields to be included in the export. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears. **Note:** If you are adding database extension fields for Courses, Historical Grades, and Student Schedules tables, enter the

	extension field name using the format [extension name].[fieldname].
If Blank, Export This	If a record has no data for a particular field, indicate a value to replace the blank field (optional). For example, enter **No Data**.
Column Number	Enter a column number for this column on the template. All column numbers will have a zero added as a suffix to the column number.
Width in Characters	Enter the width of the column in characters if using fixed-field lengths instead of field delimiters.
Alignment	Use the pop-up menu to choose the alignment of the column if using fixed-field lengths instead of field delimiters.

9. Click **Submit**. The Edit Columns page appears.
10. Repeat the previous three steps to add additional columns to the template.
11. Click **Back to Templates for Exporting**. The Templates for Exporting page appears.

The template has been changed. Perform the export by following the instructions in the section *Export Using a Template*.

How to Edit a Template

When you need a list that differs slightly from the list that a template produces, you can easily modify the template to meet your needs.

Note: Everyone who uses the template will view the changes you enter. Contact other users before changing a template that many people use.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the name of the template you want to edit. The Edit Export Template page appears.
7. Edit the information as needed. For field descriptions, see *How to Create an Export Template*.
8. Click **Submit**. The Templates for Exporting page appears. To continue modifying the template, see *How to Edit Template Columns*.

How to Edit Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click the Title of the column you want to edit. The Edit Column page appears.

8. Edit the information as needed. For field descriptions, see *How to Add Template Columns*.
9. Click **Submit**. The Edit Columns page appears.

How to Delete a Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the name of the template you want to delete. The Edit Export Template page appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The Selection Deleted page appears.

How to Delete Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click the Title of the column you want to delete. The Edit Column page appears.
8. Click **Delete**.
9. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export Using a Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Use the following table to enter information in the fields:

Field	Description
Type of Export	The type of data to export appears.

Export template?	Choose the template to export from the pop-up menu.
For Which Records?	The number of selected records appears.

6. Click **Submit**. The results of the export appear.
7. Choose **File** > **Save As...**.
8. In the Save dialog, specify a name, location, and file type.
9. Click **Save**. Open the file using a spreadsheet or other application.

AutoSend Setup

Create AutoSend records to determine whether your PowerSchool system can automatically create a copy of the information you specify at the selected date and time intervals and export the file to another system.

When creating an AutoSend record, you can determine the export parameters for each of the following types of data:

- Attendance
- Course
- Section
- Student schedule
- Student demographic
- Teacher

How to Add an AutoSend Record

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. The AutoSend Setup page appears.
3. Click **New**. The AutoSend Record page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Name	Enter the name of this record.

<table>
<tr><td>Data to Send</td><td>Use the pop-up menu to choose the data you want to send with this record:
Attendance
Courses
Sections
Student Schedules
Students
Teachers
Note: Attendance table options are affected by the choice of attendance recording methods. For more information, see Attendance Preferences.</td></tr>
<tr><td>When to Execute</td><td>Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically export a copy of the data.

Note: If the minutes are 00, Autosend runs after the Hourly Process has completed (not specifically on the hour stated but within that hour).</td></tr>
<tr><td>Days to Execute</td><td>Enter the days of the week you want the system to export the data. Starting with Monday, use the following abbreviations: MTWHFSU.</td></tr>
<tr><td>Turn Execution Off</td><td>Select the checkbox to stop the system from automatically exporting data. To turn AutoSend on, deselect the checkbox.</td></tr>
<tr><td>Send Output to</td><td>Indicate the method by which you want to export the records to the other system from the pop-up menu.

To use a local (or network shared file system to export the records to the other system:
Choose Local (or network shared) File System.
To use the file transfer protocol (FTP) to export the records to the other system:</td></tr>
</table>

	1. Choose **Ad Hoc FTP Server**. 2. Enter information in the following fields: • **Use Passive Mode** - If your FTP has difficulty transferring, select the checkbox. • **FTP host name** • **FTP account name** • **FTP password** • **Timeout in seconds** - Indicates the number of second that PowerSchool will try to make the initial FTP connection with the remote system. To use a managed connection, such as SFTP, to export the records to the other system: 1. Choose **Managed Connection.** A second pop-up menu appears. 2. Choose a managed connection from the pop-up menu. **Note:** Managed Connections only appears in the pop-up if configured and download capability is enabled. See **System > System Settings > Plugin Management > Remote Connection Manager**.
Path	If you do not use FTP to send the export file to another system, enter the path and name of the file destination on your PowerSchool server. If you use FTP to send the export file to another system, enter the path and file name of the file destination on the FTP server. If this is on a single node, the path must be defined as being from the root. If this is a server array, use only the file name and never the path, since there is only one location for Autosend files to be imported from on a server array. The file will be exported in text format (.txt). Dynamic file naming options: • %d = Date in YYYY-MM-DD format. 2016-11-14 • %t = Time in HR24MI format. 1312 • %s = CurSchoolID. 100

	For example, c:\data\myfile-%d-%t-%s.txt would produce a file called c:\data\myfile-2016-11-14-1312-100.txt when executed.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the export file: • **Tab** • **Comma**
Record Delimiter	Use the pop-up menu to choose how records are separated in the export file: • **CRLF**: carriage return, line feed • **CR**: carriage return • **LF**: line feed
Sort Order	Enter the order that this record appears on the AutoSend Setup page. If you do not make a choice, the order is alphabetical by the name of the AutoSend record.
First record of file is "number_of_records="	The system does not export the file if the number of records in it does not match the number given in the first record of the file. It is recommended that you select the checkbox.
Include "upload_type"	If you select the checkbox, the first or second record of the export includes the text upload_type=, followed by the upload type.
Attendance-Specific Settings	If you chose Attendance from the Data to Send pop-up menu, select an option to indicate which attendance data you want the system to include in the export file: • **Send any attendance modified in the last 24 hours** • **Send attendance modified since last upload** • **Send attendance data modified between these dates**: Enter the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert

	appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. • **Send all attendance to date** Otherwise, leave this field blank.
Student-Specific Settings	If you chose Students from the Data to Send pop-up menu, the system includes all students currently enrolled at your school in the export file.
E-Mail completion report to	Enter the email addresses of the people you want the system to send a completion report to each time it exports this file. Separate multiple addresses with commas.
Fields to export	Choose the PowerSchool fields to include in this export file from the pop-up menu. **Note:** If you are adding database extension fields, enter the extension field name using the format [extension name].[fieldname].
Duplicate this AutoSend record to all schools on this server	If you are creating this record for the first time, you may want to select the checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect the checkbox.
Duplicate this AutoSend record to district office	If you are creating this record for the first time, you may want to select the checkbox to make the record available to the district office. Otherwise, deselect the checkbox. **Note:** This option is only for the Students or Teacher tables.

5. Click **Submit**. The AutoSend Setup page displays the new AutoSend record.

How to Edit an AutoSend Record

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. The AutoSend Setup page appears.

3. Click in the Name column the AutoSend record you want to edit. The AutoSend Record page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an AutoSend Record*.
5. Click **Submit**. The AutoSend Setup page displays the edited AutoSend record.

How to Delete an AutoSend Record

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. The AutoSend Setup page appears.
3. Click in the Name column the AutoSend record you want to delete. The AutoSend Record page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Manually Run an AutoSend Record

Manually run an AutoSend record to avoid waiting for the process to automatically run on the specified day and time.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. The AutoSend Setup page appears.
3. Click **Run Now**. The AutoSend record runs and displays the results.

Direct Database Export

Direct Database Access (DDA), also called Universal Search & Modify (USM), is one of the most versatile functions of your PowerSchool system. Use DDA to search and match data in all of the internal tables on your PowerSchool server.

Note: Depending on your security settings, you may not be able to perform all functions.

PowerSchool data is stored in a relational database of tables. Each table contains an unlimited number of fields. When you use DDA, you directly access a table in the relational database.

Use PowerSchool's Direct Database Export (DDE) page when you need to create an export file or report that contains records from the tables. Use another application, such as a spreadsheet application, to view or organize the records. Unlike using the Export Using Template page, you can match and export data from two related tables.

You do not have to access DDA to export data from it. You can export DDA data while you are signed in to PowerSchool. When you export data from DDA, the system creates an independent export file that you can open or update using any application you want.

For example, assume you want to export all ninth graders and their current grades to a software application in which you can create a pie graph. Use the DDE function to match the records in the student table to the current grades table; then, export both tables of data, open the export file in a spreadsheet application, and create the graph.

Note: For detailed information about PowerTeacher Gradebook administration and setup, see the *Enable PowerTeacher for a Selection of Teachers* section in the *PowerTeacher Gradebook Administrator Installation and Setup Guide* available on PowerSource.

How to Select Records for Export-List View

View a list of all records in a selected table or search for specific records in a table. You can also limit the export to records for all schools on your system or for just one school. For example, export student data about California residents in fourth grade or above who attend all schools on the system.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Direct Database Export**. The Direct Database Export (DDE) page appears.
3. Use the following table to enter information in the fields:

Field	Description
Current Table	Choose the table from which you want to export records from the pop-up menu. **Note:** Database extension tables can be selected on the **Current Table** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource. **Note:** See http://[your.school.address]/admin/home?ac=structure for a complete list of PowerSchool tables and fields.

Select all [x] records in this table	To indicate the records to use in the export, do one of the following: • Click **Select all [number of] records in this table** to select all records and skip to Step 10. • Identify search criteria in the Search Students fields by continuing to the next step. **Note:** Search for students either on the Search Students page before beginning this procedure or on the Direct Database Export page. Repeat steps 5-7 to use the second search field on the Direct Database Export page, or repeat steps 5-9 to narrow the search results even further.
Search [Table Name]	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: • Equals (**=**) • Less than (**<**) • Greater than (**>**) • Less than or equal to (**<=**) • Greater than or equal to (**>=**) • Does not equal (**#**) • Contains (**contains**) • Does not contain (**!Contain**) Enter the value for the field in the last field.
Search only in records belonging to [school name]	Select the checkbox to filter your school's records in the search.

4. Click **Search within the current [number of selected] records only**. The Direct Database Export (DDE) page displays the new number of current records in selection.
5. Click **List View** to make sure you selected the records you want to export. The List Records: [Table name] page appears with the fields separated by five periods.

Note: Click the field value to link to the Display Record page, which displays all fields and their values for the selected record.

How to Select Records for Export-Table View

View a report in a table format of all records in a selected table, or search for specific records in a table. You can also limit the export to records for all schools on your system or just one school. For example, export student data about California residents in fourth grade or above who attend all schools on the system.

To modify the format of the table view, see *How to Format the DDE Table View*.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Click **Direct Database Export**. The Direct Database Export (DDE) page appears.
3. Use the following table to enter information in the fields:

Field	Description
Current Table	Choose the table from which you want to export records from the pop-up menu. **Note:** Database extension tables can be selected on the **Current Table** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource. **Note:** See http://[your.school.address]/admin/home?ac=structure for a complete list of PowerSchool tables and fields.
Select all [x] records in this table	To indicate the records to use in the export, do one of the following: • Click **Select all [number of] records in this table** to select all records and skip to Step 10. • Identify search criteria in the Search Students fields by continuing to the next step. **Note:** Search for students either on the Search Students page before beginning this procedure or

	on the Direct Database Export page. Repeat steps 5-7 to use the second search field on the Direct Database Export page, or repeat steps 5-9 to narrow the search results even further.
Search [Table Name]	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: • Equals (**=**) • Less than (**<**) • Greater than (**>**) • Less than or equal to (**<=**) • Greater than or equal to (**>=**) • Does not equal (**#**) • Contains (**contains**) • Does not contain (**!Contain**) Enter the value for the field in the last field.
Search only in records belonging to [school name]	Select the checkbox to filter your school's records in the search.

4. Click **Search within the current [# of selected] records only**. The Direct Database Export (DDE) page displays the new number of current records in selection.
5. Click **Table View** to make sure you selected the records you want to export. The List Records: [Table name] page appears with the records in a table format.

   Note: Click the field value to link to the Modify Record page.

How to Format the DDE Table View

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Direct Database Export**. The Direct Database Export (DDE) page appears.

3. Click **Table View Setup**. The DDA/DDE Table View Setup page appears.
4. Use the following table to enter information in the fields:

Field	Description
Maximum Number of Records Per Page	Enter the maximum number of records you want to appear on each page of the table.
Maximum Number of Fields Per Table	Enter the maximum number of fields you want the table to display.
Maximum Number of Character Per Field	Enter the maximum number of characters each field in the table can display.
Use Font Tag	Select the checkbox to apply font formats. Otherwise, deselect the checkbox.
Format Data	Select the checkbox if you want the system to format the data within the table. Otherwise, deselect the checkbox.
Use Gridlines	Select the checkbox if you want the table to separate each field of data with gridlines. Otherwise, deselect the checkbox.
Alternate Colors	Select the checkbox if you want the table to display each row of data in a different color. Otherwise, deselect the checkbox.
Use Cell Padding	Enter a number to indicate how much padding you want each cell of the table to contain around the text. Most users enter a number between **1** and **3**.

5. Click **Submit**. The Direct Database Export (DDE) page appears.

How to Match Selections for Export

Match the records you searched for and selected in one table to records in another table to gather and select information, so you can view what you need. For example, match records in the Students table to records in the CC (current grades) table.

Note: You cannot match tables that do not have a relationship or shared field. For example, you cannot match the Students table to the Teachers table.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Direct Database Export**. The Direct Database Export (DDE) page appears.
3. Choose one of the tables to match from the Current Table pop-up menu.
4. Click **Select all [#] records in this table**. The Direct Database Export (DDE) page displays the new number of current records in selection.
5. Click **Match Selection**. The Match USM Selection page appears.
6. Choose the second table to match from the pop-up menu.
7. Click **Proceed to match selection**. The Direct Database Export page displays the total number of records between the two matched tables that you can export. To export the selected records, see *How to Export Records*.

How to Export Records

Before exporting records, you must first select the records using the Direct Database Export function.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Direct Database Export**. The Direct Database Export (DDE) page appears.
3. Select records for exporting. For more information, see *How to Select Records for Export-List View*, *How to Select Records for Export-Table View*, or *How to Match Selections for Export*.
4. Click **Export Records**. The Export Records page appears.
5. Use the following table to enter information in the fields:

Field	Description

Fields	Use the pop-up menu to choose the fields from which you want to export a copy of the data. After you choose each field, the system inserts the field name in the text box. Enter as many fields as needed. Only one field appears per line. Separate multiple fields with a hard return. To include fields from another table, manually enter the name of the table in brackets, then the field name in the field box. For example, to export fields from the Sections table and include teachers' names, enter **[teachers]lastfirst**. To include database extension fields from another table, manually enter [Table.ExtensionName] in brackets, followed by the field name. For example, to export fields from the Sections table and include alternate course number, enter **[Courses.CoursesCoreFields]Alt_Course_Number**.
Field Delimiter	A field delimiter separates fields (or "columns") in the exported data. Use the pop-up menu to choose how you want the system to separate each field in the export file: • **Tab** • **Comma** • **None** • **Other**: Enter the delimiter in the blank field.
Record Delimiter	A record delimiter separates records (or "rows") in the exported data. Use the pop-up menu to choose how you want the system to separate each record in the export file: • **CR**: Carriage return • **CRLF**: Carriage return and line feed • **LF**: Line feed • **Other**: Enter the delimiter in the blank field.
Surround Fields	Select the checkbox if you want the system to surround each field with quotation marks in the export file. Otherwise, deselect the checkbox.

Column titles on 1st row	Select the checkbox if you want the first row of the export file to have column titles indicating the fields included in each column. Otherwise, deselect the checkbox.
Sorting Records	Determine the order of the records in the export file. Define a primary, secondary, and tertiary sort. In the first field in the Sort Field Name column, enter the field name by which you want to primarily sort the records in the file. Then, select one of the following to determine to sort records by this field in ascending or descending order: • **<** (descending) • **>** (ascending)

6. Click **Submit**. For Mac users, the results of the export appear. For Windows users, continue to the next step.
7. Choose **File > Save As....**
8. In the **Save** dialog, specify a name, location, and file type.
9. Click **Save**. Open the file using a spreadsheet or other application.

Data Export Manager

Using the Data Export Manager, you can quickly and easily export data from PowerSchool tables, database extensions, and PowerSchool data sets into a text file.

PowerSchool Tables

Individual access to most PowerSchool tables is provided through Data Export Manager. Some tables have been removed for security reasons or because they are part of system processes.

Database Extensions

Database extensions allow you to display customized information in PowerSchool. Access to one-to-one, one-to-many, and independent database extensions is provided through Data Export Manager. Database extensions may be created through the PowerSchool user interface and define the table structure and related fields.

- Database extension tables are listed in the Export From pop-up menu on the Data Export Manager page using the name of the table.
- Database extension table fields are available in the Data Export Manager when selecting fields to export.
- After choosing a database extension table, the database extension table fields appear in a field list on the left side of the Data Export Manager page. The fields appear in the following order:
  - Each table lists its fields alphabetically after any primary and foreign keys.
  - If the selected database extension table is a 1-to-1 or a 1-to-many extension of a core table, the extension fields appear first, followed by the associated parent table and any of its extensions.
  - If the database extension table is an independent table that does not have a parent table, its fields appear first, followed by any of its extension fields.
  - A child table extension will list its fields and extensions first, followed by its parent table fields and extensions.
- Standard export options are available when exporting from a database extension table.
- Export results for an export from a database extension table are displayed in the downloaded export file.

For more information, see *Database Extensions*.

PowerSchool Data Sets

A PowerSchool data set is a data source that can be accessed via Data Export Manager, as well as the API. A typical PowerSchool data set declares a set of arguments, a set of columns, and a select statement. The arguments are optional, but the columns and select statement are required. A PowerSchool data set is pre-defined by PowerSchool and includes export modules for Course Archive, Incident, Student Email, Transportation, as well as data sets for Students + Courses and others.

Additional Data Sets

Additional data sets, also available through Data Export Manager, provide more specific access to data within PowerSchool. Additional data sets may be defined by PowerSchool or by a third-party as a PowerQuery and installed in PowerSchool via the Plugin Package. Once the plugin is installed and enabled, the third-party data set becomes accessible as another resource in PowerSchool.

Note: PowerQueries may be created for a specific function within PowerSchool and may not necessarily be designed for use with the Data Export Manager. Consequently, unexpected behaviors may occur when used outside of their primary context.

Set Page-Level Permissions

To ensure that only authorized staff members access the mass data export pages, set page-level permissions for **Start Page > Special Functions** under **Functions** in the main menu **> Importing & Exporting > Data Export Manager** under Exporting. For more information about setting page-level permissions, see *Security Permissions*.

Export/Edit Settings

Using the Export/Edit tab on the Edit User Access Roles page, you can define which data sources a user can export and/or edit. These access levels only apply to exporting, previewing and editing via the Data Export Manager.

Note: For more information, see *User Access Roles*.

How to Define Export/Edit Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Click the name of the role you want to edit. The Edit User Access Role page appears.
5. Click the **Export/Edit** tab.

6. Use the following table to enter information in the Settings section:

Field	Description
Default Access Level	Select the **Export** checkbox to permit users assigned to this role to export content from any data source set to use the default settings. Select the **Edit** checkbox to permit users assigned to this role to edit content from any extensions set to use the default settings. **Note:** The **Edit** checkbox only displays for database extensions since the Data Export Manager only allows for editing of those fields.
User can set up and run scheduled system templates	Select the checkbox to permit users assigned to this role to set up and run scheduled templates.

7. Use the following table to enter information in the Filter section:

   Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	Description
Data Source Name	The data source from which data is derived. To narrow the list of data sources by data source name: 1. Click the **Add (+)** button. 2. Choose **Data Source Name** from the first pop-up menu. 3. Enter the data source name or a portion of the name. 4. Click **Apply**.
Parent Name	To narrow the list of data sources by parent name: 1. Click the **Add (+)** button. 2. Choose **Parent Name** from the first pop-up menu. 3. Enter the parent name or a portion of the name.

	4. Click **Apply**. **Note:** Parent column contents vary by data source type. For extensions, it displays the name of the table that is extended. For tables, it displays its own name. For data sets, it appears blank.
Type	To narrow the list of data sources by data set type: 1. Click the **Add (+)** button. 2. Choose **Type** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **Table** • **Data Set** • **Extension** 4. Click **Apply**.
Category	To narrow the list of data sources by category: 1. Click the **Add (+)** button. 2. Choose **Category** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • [No Category] • [Any of the functional-based categories] 4. Click **Apply**.
Use Defaults	To modify this filter: 1. Click the **Add (+)** button. 2. Choose **Use Defaults** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • Choose **Data Sources using the default setting**. • Choose **Data Sources *not* using the default setting**. 4. Click **Apply**.

	Note: By default, this filter is set to **Data Sources *not* using the default setting**.
Export	To narrow the list of data sources by whether or not the **Export** checkbox is selected: 1. Click the **Add (+)** button. 2. Choose **Export** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **True** • **False** 4. Click **Apply**.
Edit	To narrow the list of data sources by whether or not the **Edit** checkbox is selected: 1. Click the **Add (+)** button. 2. Choose **Edit** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **True** • **False** 4. Click **Apply**.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

8. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	Description
Data Source Name	The data source name appears.

	If the data source is a PowerQuery, it appears as a link. Users must have access to all required tables within the data set in order for the data set to be available in the Data Export Manager. 1. Click the data set name to see its table dependency information. The [Data Set] drawer opens. 2. Click **Apply** to grant this role access to the data set and all tables listed. The [Data Set] drawer closes.
Parent Name	The parent name appears.
Type	The type appears.
Category	The category appears.
Use Defaults	Do one of the following: • Select the checkbox in the header row to select the **Use Defaults** checkbox for all filtered data sources. • Deselect the checkbox in the header row to deselect the **Use Defaults** checkbox for all filtered data sources. • Select the checkbox to use the role's default export and edit settings for a data source. • Deselect the checkbox to use the data source specific export and edit settings.
Export	Do one of the following: • Select the checkbox in the header row to permit exporting of all filtered data sources. • Deselect the checkbox in the header row to prohibit exporting of all filtered data sources. • Select the checkbox next to a specific data source to explicitly permit exporting of the specific data source. • Deselect the checkbox next to a specific data source to explicitly prohibit exporting of the specific data source.

Edit	Do one of the following: • Select the checkbox in the header row to permit editing of all filtered data sources. • Deselect the checkbox in the header row to prohibit editing of all filtered data sources. • Select the checkbox next to a specific data source to explicitly permit editing of the specific data source. • Deselect the checkbox next to a specific data source to explicitly prohibit editing of the specific data source. **Note:** If this checkbox next to a specific data source is selected/deselect, the **Export** checkbox is automatically selected/deselected as well. **Note:** This checkbox only applies to editing extensions.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

9. Click **Save**. A confirmation message appears.

   Note: Changes are also saved for fields that may no longer be visible with the current filter.

How to View Data Export Manager Information for Assigned Roles

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Click the [Information Icon] next to the role for which you want to view Data Export Manager information. Data Export Manager information appears, including the default level followed by the data sources users assigned to this role can edit and/or export.
5. When done viewing, click **OK** to close the pop-up.

Export Data Using the Data Export Manager

This procedure may be performed for a selected school or at the district level. This procedure may be performed for a student selection or teacher selection depending on your **Export From** selection. For more information about selecting students, see *Student Search*. For more information about selecting staff, see *Staff Search*.

Note: The Data Export Manager page is also accessible via **Start > System > Page and Data Management > Data Export Manager**.

How to Export Data Using the Data Export Manager

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.

   Note: The Export tab appears selected by default.

4. Use the following table to enter information in the Select Columns to Export section:

   Note: Information display based on your security permissions.

Field	Description
Category	Choose the category that contains the data you want to export from the pop-up menu: • **Tables** displays top 20 PowerSchool tables followed by most other PowerSchool tables. • **Database Extensions** displays database extensions. • **PowerSchool Data Sets** displays approved data sets and any preexisting or new export modules. • **Additional Data Sets** displays all other data sets and third-party PowerQueries. • **Show All** displays all of the above. • **[Functional Categories]**, displays any functional categories within PowerSchool that have display names, such as Attendance, Grading, or Scheduling.

<table>
<tr><td></td><td>[Uncategorized] displays any functional categories within PowerSchool that do not have display names.</td></tr>
<tr><td>Export From</td><td>Choose the data source that contains the data you want to export from the pop-up menu.

Note: Only data sources for which you have export access to all required tables and fields will be available for selection. If a data set appears shaded and cannot be selected, you do not have field level access to one or more fields used in that data set.

Note: Descriptions have been defined for many of the mass data modules and can be further customized to provide more detailed instructions. To view a list of descriptions:
On the start page, choose System under Setup in the main menu. The System Administrator page appears.
Under Data Management, click Page and Data Management. The Page and Data Management page appears.
Under Localization, click Localize PowerSchool. The Localize PowerSchool page appears.
Click the Data tab.
Choose PowerSchool Customer Defined Data from the Choose the functional area or item you want to translate pop-up menu.
Choose Mass Data Module from the Category pop-up.
Click Retrieve Text. Descriptions for the mass data module appear in the Text for translation section.
For more information, see Localize Using Batch Mode.</td></tr>
<tr><td>Select All</td><td>If the data set contains more than one table or other entity, this checkbox appears. Do one of the following:
To export all fields from all tables or entities within the data set, select the checkbox. Note all the checkboxes appear selected.</td></tr>
</table>

	• To remove all fields from all tables or entities within the data set, deselect the checkbox. Note all the checkboxes appear deselected.
[Data Source]	After choosing the data source, the available fields appear in a field list on the left side of the page. **Note:** Click the arrow to collapse a section. Click the arrow again to expand a section. Do one of the following: • To export all fields within a section, select the checkbox by the table or section name. Note all the checkboxes appear selected. • To remove all fields within a section, deselect checkbox by the table or section name. Note all the checkboxes appear deselected. • To export only certain fields within the data set, select the field checkboxes. • To remove a field, deselect the checkbox next to the appropriate field. **Note:** You can also remove a field by clicking the minus (-) button that appears on the right side of the page next to the field.
Sort	If the data set contains only one table or entity, the selected fields are sorted based on the order that the fields were selected. To modify the order of fields, use the up and down arrows to move fields. If the data set contains more than one table or entity, the selected fields are sorted based on the hierarchy of the parent, child, and sibling fields that were selected. Note the title above entity groupings. To modify the order of fields, use the up and down arrows to move fields. Fields within an entity can only be sorted within that entity. As such, some up and down arrows may be disabled to prevent invalid sorting.
Field	The internal PowerSchool field name as it appears in the data set.

Label Used on Export	Enter the name you want to appear for the field in the export file. **Note:** This field is populated with the field name from the data set. This field cannot be left blank.
Remove	Click to remove a field.

5. Click **Next**.
6. Use the following tables to review information in the Select/Edit Records to Export from [Data Source] section:

   Note: Information displays based on your security permissions.

Field	Description
Built In Filters	Click the arrow to expand this section. Click the arrow again to collapse this section. To narrow the list: 1. Enter information as needed. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**. **Note:** This section displays based on your **Export From** selection. If this section does not appear, there are no built in filters for your selection.
Column Filters	Click the arrow to expand this section. Click the arrow again to collapse this section. To narrow the list: 1. Choose the column by which you want to filter records from the **Filter by** pop-up menu. 2. Select a comparator from the **Value** pop-up menu. 3. Enter search criteria in the **Value** field. 4. To add another filter, click **+** and repeat Step 1. 5. To delete a filter, click **-** next the filter.

<table>
<tr><td></td><td>
6. Optionally, click Show Records. The page refreshes and display filtered results.

Note: To remove all filter selections, click Clear.

Note: This section displays based on your selected data set. If this section does not appear, there are no column filters for the data set.

Note: Some fields in your selected data set may not be available for filtering.
</td></tr>
<tr><td>[Export Rows]</td><td>
Select one of the following options:

Export All Rows to apply any Built In Filters.
Export Filtered Rows to apply Built In Filters and Column Filters.

</td></tr>
<tr><td>Edit All Filtered Records</td><td>
It is extremely important to note that you are making a permanent mass-change to data in the database when you use this feature.

Click Show Records in order for this button to appear.
Click to edit field data for multiple records. The Edit drawer appears.
To narrow the list, enter search criteria in the Filter field.
Select the field option and then enter data.
Click Submit. The Edit closes.

Note: Only extensions from the originally selected database extension are editable.

Note: This button does not appear if you have read-only access to the page.
</td></tr>
<tr><td>Actions</td><td>

Click the Edit icon to update field data. The Edit drawer appears.
Edit information at needed.
Click Submit. The Edit closes.

</td></tr>
</table>

	Note: Only extensions from the originally selected database extension are editable. **Note:** This column does not appear if you have read-only access to the page.
[Data Source]	Fields to be exported. **Note:** Click column headings to sort in ascending order. Click again to sort in descending order.
Field Definitions	To get field definitions for the selected records: 1. Click **Get Data Dictionary Field Definitions**. A confirmation message appears. 2. Click **Download Field Definitions File**. The CSV file is downloaded and appears in separate tab.

7. Click **Next**.
8. Use the following table to enter information in the Export Summary and Output Options fields:

   Note: Information display based on your security permissions.

Field	Description
Export Summary | Records to Export	The number of records to be exported appears. **Note:** This number may differ from the record selection when the selected data set is from extended tables. If exporting from a standalone extended table, the total number of records displays regardless of students/teachers selection. If exporting from a 1-to-1 or 1-to-many extended table, the number of records that display depends on whether current student/teacher selection or all active students/teachers were selected.
Export Format | Export File Name	Enter the name of the export file. When export is scheduled dynamic file naming:

	%d = Date in YYYY-MM-DD format. 2016-11-14 %t = Time in HR24MI format. 1312 %s = CurSchoolID. 100 For example, c:\data\myfile-%d-%t-%s.txt would produce a file called c:\data\myfile-2016-11-14-1312-100.txt when executed. **Note:** Default is set to **[selected data source]_export.txt**. **Note:** Special characters in file names may not display properly depending on your operating system. For example, characters considered reserved by your operating system or file names with leading or trailing periods.
Export Format | Line Delimiter	Use the pop-up menu to choose which delimiter to use to separate the lines of data in the export file: **CR**: Carriage return (default) **CRLF**: Carriage return/line feed **LF**: Line feed **Other**: If selected, enter the type of end-of-line delimiter in the adjacent field, such as a semicolon. **Note:** Only one character may be entered. A double quote character is not allowed.
Export Format | Field Delimiter	Use the pop-up menu to choose which delimiter to use to separate the fields in the export file: **Tab** (default) **Comma** **Other**: If selected, enter the field delimiter in the adjacent field. **Note:** Only one character may be entered. A double quote character is not allowed.
Export Format | Character Set	Use the pop-up menu to choose the character set for the export file. This selection is specific to the operating system where the import file was created:

	• **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** • **UTF-8** **Note:** Defaults to the appropriate character set based on the client operating system.
Export Options | Include Column Header	Do one of the following: • Select the checkbox if you want a header row to appear in the export file. • Deselect the checkbox if you do not want a header row to appear in the export file. **Note:** By default, the checkbox is selected. **Note:** Column headers are defined using the **Label** field in the Select Columns to Export section.
Export Options | Surround "Field Values" in Quotes	Do one of the following: • Select the checkbox if you want the exported field values to appear with quotes around them in the export file. • Deselect the checkbox if you do not want the exported field values to appear with quotes around them in the export file. **Note:** By default, the checkbox is not selected.

9. Use the following table to do one of the following:

Field	**Description**
Export	Click **Export**. Save and/or download the export file to your desktop (varies depending on your browser). **Note:** If using Excel to view an export file that includes fields containing characters that are being used as a record delimiter,

	content may not be parsed correctly. It is recommended that you use a text editor to view the export file.
Save Template	For detailed information, see Step 5 of *How to Create a Template*.

Managing My Templates

If you export the same data frequently, you can create a template so that you don't have to define the fields, filters and Export Options used every time you perform an export. Once you create a template, the template appears on the My Templates tab. From the My Templates tab, you can easily manage your templates.

Note: Your templates are unique to your account and can be used at any school that you can switch to.

Note: Exports are always run within your current school context. Be careful when saving School ID filters as part of a template as this will prevent the export from exporting data at other schools.

How to Create a Template

Note: Student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Prepare the export as needed. All selected Fields, Filters, and Export Options will be saved with the template. For detailed information, see *How to Export Data Using the Data Export Manager*.
5. Click **Save Template**. The Save Export Template pop-up appears.
6. Enter the template name in the **Name** field.
7. Enter a description in the **Description** field.
8. Note the mapped fields that are included in the template.
9. Click **Save as New**. A confirmation message appears.

How to View Templates

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab displays the following information for each template:

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Use the following table to do one of the following:

Field	Description
Template	The name of the template. Click to load for export or editing.
Description	The description for the template.
Data Source	The data source from which the template is derived.
Actions	The actions that may be taken with the template. Use the **Schedule** icon to schedule the template for export. For more information, see *How to Schedule an Export*. Use the **Delete** icon to delete the template. For more information, see *How to Delete a Template*.

How to Apply a Template

Note: Current student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the name of the template you want to apply. The Export tab appears.
6. To continue, see Step 4 of *How to Export Data Using the Data Export Manager*.

How to Create a Template from an Existing Template

Note: Student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the name of the template you want to use to create a new template. The Export tab appears.
6. Prepare the export as needed. For detailed information, see *How to Export Data Using the Data Export Manager*.
7. Click **Save Template**. The Save Export Template pop-up appears.
8. Enter the template name in the **Name** field.
9. Enter a description in the **Description** field.
10. Click **Save as New**. A confirmation message appears.

How to Edit a Template

Note: Student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the name of the template you want to edit. The Export tab appears.
6. Prepare the export as needed. For detailed information, see *How to Export Data Using the Data Export Manager*.
7. Click **Save Template**. The Save Export Template pop-up appears.
8. Click **Save**. A confirmation message appears.

How to Delete a Template

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Delete** icon next to the template you want to delete.
6. Click the **Confirm Delete** icon. A confirmation message appears.

Managing Scheduled System Templates

Once a template is scheduled for export, it becomes a system template and is available for exporting data associated only within the school context it is created. System templates created at the district office will export data from all schools.

Data exported from System Templates do not have field level security restrictions. However, users who are permitted to set up and run scheduled system templates do not necessarily have access to the export destination. Security of the export destination is managed by its own security mechanisms, outside of PowerSchool.

How to Schedule a Template for Export

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.

4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Schedule Template** icon next to the template you want to schedule for export. The Set Schedule drawer appears.

   Note: This button only appears for users with a role permitted to edit scheduled system templates.

6. Use the following tables to enter information in the fields:

Field	Description
Schedule Active	By default, this checkbox is selected indicating PowerSchool is scheduled to automatically export a copy of the data. If you do not want PowerSchool to automatically export a copy of the data, deselect the checkbox.
Days to Execute	Select the checkbox next to each day of the week you want PowerSchool to automatically export a copy of the data: • **Mon** • **Tues** • **Wed** • **Thu** • **Fri** • **Sat** • **Sun**
When to Execute	Enter the hour and minutes you want PowerSchool to automatically export a copy of the data.
Send Output To	Choose the method by which you want to export a copy of the data from the pop-up menu: • **PowerSchool Folder**

	• **SFTP** **Note:** For more information about SFTP, see *Remote Connection Management*.
Path	Enter the path where you want the exported file saved. A relative path may be entered, such as /folder/subfolder. In which case, the file will be written to the given path relative to the PowerSchool data folder as defined by the PowerSchool Installer. An absolute path preceded by drive letter may also be entered, such as F:\exportdirectory\. Absolute paths may only refer to local drives in a single node environment or to network drives as defined by the PowerSchool Installer for multi-node environments.
Email Completion Report To	Enter the email addresses of the people you want to send a completion report to each time it exports this file. Separate multiple addresses with commas.

7. Click **Save**. A confirmation message appears. The scheduled template now appears on the Scheduled System Templates tab.

How to View Scheduled System Templates

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.
5. Use the following tables to view information in the fields:

Field	Description
Template	The name of the template scheduled for export. Click to load for export or editing.

	Note: When template is scheduled, the name of the template is appended with (copy).
Data Source	The data source from which the template is derived.
Status	Indicates whether or not the scheduled export is set active. For more information, see *Schedule Active*.
Last Run	Indicates one of the following: • The date and time the scheduled export completed. • The date and time the scheduled export failed. • The date and time the scheduled export began running.
Actions	The actions that may be taken with the scheduled export. Use the **Edit** icon to edit scheduled export options. For more information, see *How to Edit System Template Schedule Options*. Use the **Run Now** icon to run the scheduled export immediately. For more information, see *How to Run a Scheduled System Template*. Use the **Delete** icon to delete a scheduled export. For more information, see *How to Delete a Scheduled System Template*.

How to View Scheduled System Template Results

Once a scheduled export runs, navigate to where the exported file was saved (designated path) to view scheduled export results.

How to Edit System Template Schedule Options

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.

Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Edit** icon next to the template you want to edit. The Set Schedule drawer appears.
6. Edit as needed. For field descriptions, see *How to Schedule an Export*.
7. Click **Save**. A confirmation message appears.

How to Run a Scheduled System Template Immediately

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Run Now** icon next to the template you want to run. A confirmation message appears.
6. Navigate to where the exported file was saved (designated path) to view scheduled export results.

How to Delete a Scheduled System Template

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Delete** icon next to the template you want to delete.
6. Click the **Confirm Delete** icon. A confirmation message appears.

Import and Export Standards

Using the PowerSchool import and export feature, you can manage standards more efficiently for your district.

There are three areas in which you can import and export standards into or out of PowerSchool. Each area provides specific information for managing standards.

- Standards: District List for importing and exporting general information and associations for standards.
- Standards: Course Weight for importing and exporting course weights for a parent standard or lower level standard.
- Standards: Final Grade By Class for importing and exporting standards final grades.

You can import your standards into PowerSchool and make them available for teachers to use in PowerTeacher Pro.

The Data Import Manager page is accessible via **Start > System > Page and Data Management > Data Import Manager**. You must have the correct security permissions and user roles in order to use this feature.

Standards: District List

Use the Standards: District List to mass update general standards information, such as the identifier, conversion scale, grade scale, or parent identifier.

How to Export Standards: District List

When updating standards, you can either use the Standards ID or the identifier and year. You can obtain the ID for each standard by exporting the Standards: District List first. You can use the export to add or change data and import it back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Select P**owerSchool Data Sets** from the Category pop-up menu.
5. Select **Standards: District List** from the **Export From** pop-up menu. The Standards: District List available fields appear in a field list on the left side of the page.
6. Select the fields you want to export.

- If you want to export the data to make changes and then import it back in to PowerSchool, select the **ID** field, as this may make the import a bit faster than using the identifier and year. If the ID, Identifier and Year are all in the import file, the import process will key off of the ID.
- If you want to use this export to create new grade scales and import them into PowerSchool to be used by PowerTeacher Pro, the following fields are required in the file:
    - **ID**
    - **Name**
    - **GradescaleItemDCID**
    - **ConversionScaleID**
    - **YearID**

7. Change the sort order and labels for the export as needed.
8. Click **Next**. The Select Columns to Export page appears.
9. Set the filter criteria, and then click **Show Records**. The data appears on the page.
10. Click the **Pencil** icon next to the record you want to edit. The Edit drawer appears.
11. Enter the changes for the record and click **Submit** to close the Edit drawer.
12. Click **Next** on the Data Export Manager page.
13. Select the export output options, and then click **Export**.

How to Import Standards: District List

You can make additional changes as needed to the file prior to importing back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manager**. The Data Import Manager page appears.
4. Select the source file for the import.
5. Select **Standards: District List** from the **Import Into** pop-up menu, and then select the **Field Delimiter** for the file.
6. Click **Next**.
7. Select the **PowerSchool Field** to map the information from the import file from the pop-up menu.
8. Click **Next**.
9. Select the import options for the file.

   Note: The Longitudinal ID is a number used to link a standard from year to year. If you do not specify the Longitudinal ID in the import file, you have the option of retrieving the ID of the matching identifier from a previous year or creating a new value.

10. Click **Import**.

Standards: Course Weights

To import course weights, you must have standards already created and associated to courses in PowerSchool.

In the Standards: Course Weights dataset, the Parent Weight is used when calculating a final traditional grade. Modifying this weight will impact final traditional grades.

Child Weight is rolled up to the Parent Weight in final standards grades.

How to Export Standards: Course Weights

You can export the Standards: Course Weights data set, make any necessary changes, and import the updated dataset back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Select **PowerSchool Data Sets** from the **Category** pop-up menu.
5. Select **Standards: Course Weights** from the **Export From** pop-up menu. The Standards: Course Weights available fields appear in a field list on the left side of the page.
6. Select the fields you want to export.
    - If you want to make changes to this dataset and import it back in to PowerSchool, the **YearID** field is required in the data import file when creating new course weights via import. Additionally, you can include a combination of the following fields in the import file:
        - **ParentCourse**
        - **ParentStandardID**
        - **StandardCourceAssocID**
7. Change the sort order and labels for the export as needed. You can only filter on certain Parent record fields.
8. Click **Next**. The Select Columns to Export page appears.
9. Set the filter criteria, and then click **Show Records**. The data appears on the page.
10. Click the **Pencil** icon next to the record you want to edit. The Edit drawer appears. You can only edit Parent weights using this feature.
11. Enter the changes for the record, and then click **Submit** to close the Edit drawer.
12. Click **Next** on the Data Export Manager page.

13. Select the export output options, and then click **Export**.

How to Import Standards: Course Weights

You can make additional changes as needed to the file prior to importing back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manager**. The Data Import Manager page appears.
4. Select the source file for the import.
5. Select **Standards: Course Weights** from the **Import Into** pop-up menu and select the **Field Delimiter** for the file.
6. Click **Next**.
7. Select the **PowerSchool Field** to map the information from the import file from the pop-up menu.
8. Click **Next**.
9. Select the import options for the file.
10. Click **Import**.

Standards: Final Grades By Class

Export a list of all standards final grades. This export allows you to choose if you want to use the current student selection to export final grades for a selection of students.

How to Export Standards: Final Grades By Class

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Select **PowerSchool Data Sets** from the **Category** pop-up menu.
5. Select **Standards: Final Grades By Class** from the **Export From** pop-up menu. The Standards: Final Grades By Class available fields appear in a field list on the left side of the page.
6. Select the fields you want to export.
7. Change the sort order and labels for the export as needed.
8. Click **Next**. The Select Columns to Export page appears.

9. Select the **Use current student selection** checkbox to use your current student selection for the export. Select the **Year to include** from the pop-up menu. Additionally, you can filter on Standard Identifiers, Course Numbers, and StoreCodes. The export will only export standards grades for the schools for which you have security permissions enabled.
10. Click **Next.**
11. Select the export output options and click **Export**.

How to Import Standards: Final Grades By Class

You can make changes as needed to the file prior to importing back in to PowerSchool.

1. O the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manage**r. The Data Import Manager page appears.
4. Select the source file for the import.
5. Select **Standards: Final Grades By Class** from the **Import Into** pop-up menu and select the **Field Delimiter** for the file.
6. Click **Next**.
7. Select the **PowerSchool Field** to map the information from the import file from the pop-up menu.
8. Click **Next**.
9. Select the import options for the file.
10. Click **Import**.

Incident Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Use Incident Management to specify and record an entry for school or district-related discipline incidents. These incidents may include from zero to many participants and may include students, teachers, and persons known or unknown, not enrolled or employed by the school district. Incidents may also include from zero to many objects, such as weapons, drugs, vehicles, and any other item that is part of the incident. Actions may also be attached to incidents in a zero to many relationship and describe actions taken as a result of the incident. Objects and actions may be linked to participants as well as the incident itself. For example, a weapon may be linked directly to a person or simply found at the scene. The action of "increased security" may be related to an incident of vandalism with no participants or linked directly to a participant as in suspension for a student who committed an offense.

Creating discipline incidents involves selecting the incident types, codes, and subcodes which are created at the district level. This ensures that all schools are using the same data to enter discipline incidents. For more information, see *Incident Types*, *Incident Codes*, *Incident Subcodes*, and *Secondary Incident Subcodes*. Search for existing incidents on the Incident List page or create a new incident on the Incident Detail page. For more information, see *Incident Search and List* and *Discipline Incidents*.

Incident codes allow you to manage specific information by category, subcategory, and incident type. These codes and subcodes appear on the Incident Detail page for those users with assigned page-level security. Security settings determine who can view, create, and edit incidents. For more information, see *How to Edit Security Groups*.

Access incident information either by viewing incidents within PowerSchool by performing an ODBC/JDBC query using a third-party application such as Microsoft Excel. Future access through reports is planned and state reporting extracts will use this incident data.

Setup

Incident Code Types

Code types are used as an organizational tool to categorize incidents. PowerSchool includes the following 11 system-defined, non-editable code types that provide the basis from which all user-defined incident codes, subcodes, and secondary subcodes are created:

Category	Description
Action Attributes	Use to describe further details about an action taken in response to an incident. Defined codes and subcodes display on the Add/Update Action dialog accessed in the Incident Element section of the Incident Detail page. Information appears based on the data type selected for each action attribute, text, number, or date fields or as a yes/no or subcode selection pop-up menus. For more information, see *How to Add an Action*.
Action Change Codes	Use to describe reasons an action was changed. Defined codes display as a pop-up menu on the Add/Update Action dialog accessed in the Incident Builder section of the Incident Detail page. For more information, see *How to Add an Action*.
Action Codes	Use to describe actions taken in response to an incident. Defined codes and subcodes display as pop-up menus on the Add/Update Action dialog accessed in the Incident Elements section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Add an Action*.
Attribute Codes	Use to describe further details about of an incident. Defined codes display as headings and subcodes display as checkboxes on the Add/Update Attribute dialog accessed in the Incident Element section of the Incident Detail page. For more information, see *How to Add an Attribute*.

Behavior Codes	Use to describe the type of behavior for which the discipline incident was created. Defined codes and subcodes display as pop-up menus on the Add/Update Behavior dialog accessed in the Incident Elements section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Add a Behavior*.
Duration Codes	Use to describe the period of time the incident lasted. Defined codes and subcodes display as pop-up menus on the Add/Update Action dialog in the Incident Element section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Add an Action*.
Location Codes	Use to describe the place where the incident occurred. Up to 50 characters may be entered when creating codes and subcodes. Defined codes and subcodes display as pop-up menus in the Incident Description section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Create a Discipline Incident*.
Object Codes	Use to describe an item used in the incident. Defined codes and subcodes display as pop-up menus on the Add/Update Object dialog in the Incident Element section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Add an Object*.
Participant Attribute Codes	Use to describe further detail about a participant. Defined codes and subcodes display as pop-up menus on the Add/Update Participant Attributes dialog in the Incident Builder section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Create a Discipline Incident*.

Participant Roles Codes	Use to describe a participant's role in the incident. There are four system-defined codes: Reporter, Victim, Witness and Offender. While the codes are non-editable, you can define subcodes to provide more detail about a participant's role. Defined codes and subcodes display as pop-up menus on the Add/Update Participant Attributes dialog in the Incident Builder section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Create a Discipline Incident*.
Time Codes	Use to describe the period of time that the incident took place. Defined codes and subcodes display as pop-up menus in the Incident Description section of the Incident Detail page. A comment field for the selected code may also appear providing the ability to enter additional information about the code. For more information, see *How to Create a Discipline Incident*.

Incident Codes

There is no limit to the number of incident codes you can create for each code type, with the exception of Participant Roles Codes, which is limited to four system-defined, non-editable incident codes. For example, using the code type of Action, you can create a School Action incident code. Then, create subcodes such as Community Service, Counseling, and In-School Suspension to further define the School Action code. For more information about incident subcodes, see *Incident Subcodes*.

Code Type	Code	Subcode
Action	School Action	Community Service Counseling In-School Suspension

How to Add an Incident Code

Use this procedure to add an incident code. Add as many incident codes as needed per code type, with the exception of Participant Roles Codes, which is limited to four system-defined, non-editable incident codes.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow next to **Code Types** to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select the code type for which you want to create a code. The Incident Management Code & Subcode Configuration page displays the [Code Type] Codes list.

   Note: Click the arrow next to [Code Type] Codes to expand the list. Click the arrow again to condense the list.

5. Click the **Plus (+)** button in the upper-right corner. The Add New Code dialog appears.
6. Use the following table to enter information in the applicable fields:

Field	Description
Code Type	By default, the code type selected on the Incident Management Setup page appears. If needed, choose another code type from the pop-up menu. **Note**: This pop-up menu does not appear if adding an incident code using Action Attributes.
Data Type	Choose the graphical user interface that you want the action attribute to appear as on the Add Action dialog from the pop-up menu: • **Text** field • **Number** field • **Date** field • **Yes/No** pop-up menu • **Select** pop-up menu (subcodes permitted)

	Note: This pop-up menu only appears if adding an incident code using Action Attributes.
Category	Enter the name of the code category. **Note**: This is a required field.
This Action Affects Attendance	Do one of the following: • Select the checkbox to indicate this action affects attendance. • Leave the checkbox blank to indicate this action does not affect attendance. **Note:** This field only appears for Action Codes.
State Aggregate Report Code	Enter the state reporting code for this category. This code can be specified by the state department of education, or it can be a district-defined code (for example, dress code violations with several subcodes defined for the type of violation). For state-defined codes, see your PowerSchool state reporting setup guide. You can define subcodes for each aggregate report code. The subcodes roll up to the aggregate report code.
Display Order	Enter the order in which you want the code displayed on the pop-up menu or Incident Detail page, depending on the parent code type.
Severity	Enter the severity of the behavior. For state-defined severity codes, see your PowerSchool state reporting setup guide. **Note:** This field only appears if adding an incident code using Behavior Codes.
This code is not divided into subcodes	Select this option if there are no subcodes to associate to this code type. **Note:** This option does not appear if adding an incident code using Action Attributes where **Text**, **Number**, **Date**, or **Yes/No** is selected from the **Data Type** pop-up menu.

This code has at least one subcode	Select this option if there is a subcode to associate to this code type. The following fields appear: • **Subcode**: Enter the name of the subcode. • **Short Description**: Enter a short description for this subcode. • **Full Description**: Enter a full description for this subcode. To enter multiple subcodes for this code type, see *Incident Subcodes*. **Note:** This option does not appear if adding an incident code using Action Attributes where **Text**, **Number**, **Date**, or **Yes/No** is selected from the **Data Type** pop-up menu.
State Detail Report Code	Enter the state detail report code. This code can be specified by the state department of education, or it can be a district-defined code (for example, dress code violations with several subcodes defined for the type of violation). For state-defined codes, see your PowerSchool state reporting setup guide. You can define subcodes for each aggregate report code. The subcodes roll up to the aggregate report code. Multiple subcodes can be assigned to one aggregate report code. To assign additional subcodes, see *Incident Subcodes*.
State Reportable	Select the checkbox to mark this code type reportable to the state department of education. This value is used by state reports to identify incidents that have state-reportable codes and subcodes assigned.
Police Reportable	Select the checkbox to mark this code type reportable to the local police for all cases.
Allow Comment	Select the checkbox to include a comment field for the selected code providing the ability to enter additional information about the code. If the **Allow Comment** checkbox is selected, do one of the following:

	• Select the **Make this Comment Mandatory** checkbox to make entering a comment required. • Deselect the **Make this Comment Mandatory** checkbox to make entering a comment optional.
Policy Description	Enter any policy-related information that you want to communicate to users who will be working with this code.

7. Click **Submit**. The new code appears in the [Code Type] Codes list.
8. Repeat Step 5 through Step 7 for each additional code you want to create using the selected code type.

How to Edit an Incident Code

Use this procedure to edit an incident code, with the exception of the system-defined Participant Roles Codes, which are non-editable.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow next to **Code Types** to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select the code type that contains the code you want to edit. The Incident Management Code & Subcode Configuration page displays the [Code Type] Codes list.

   Note: Click the arrow next to [Code Type] Codes to expand the list. Click the arrow again to condense the list.

5. From the [Code Type] Codes list, select the code you want to edit. The selected code appears highlighted.
6. Click the **Pencil** icon next to the code. The Edit Code dialog appears.

If you selected the **This code is not divided into subcodes** option when the code was created, the following fields display as editable:

- **Category**
- **State Aggregate Report Code**
- **Display Order**

If you selected the **This code has at least one subcode** option when the code was created, the following fields display as editable:

- **Category**
- **State Aggregate Report Code**
- **Display Order**
- **This code is not divided into subcodes**
- **This code has at least one subcode**
- **State Detail Report Code**
- **State Reportable**
- **Police Reportable**
- **Allow Comment**
- **Make this Comment Mandatory**

7. Edit the information as needed. For field descriptions, see *How to Add an Incident Code*.
8. Click **Submit**. The code without the Pencil icon appears in the [Code Type] Codes list.

How to Delete an Incident Code

Use this procedure to delete an incident code that may have been created in error or that is no longer in use, with the exception of the system-defined Participant Roles Codes, which are non-editable.

Note: If an incident code is associated to an incident, it cannot be deleted. First remove the incident code from all incidents using the code and then it may be deleted. For more information, see *How to Create a Discipline Incident*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

Note: Click the arrow next to **Code Types** to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select the code type that contains the code you want to delete. The Incident Management Code & Subcode Configuration page displays the [Code Type] Codes list.

   Note: Click the arrow next to [Code Type] Codes to expand the list. Click the arrow again to condense the list.

5. From the [Code Type] Codes list, select the code you want to delete. The selected code appears highlighted.
6. Click the **Pencil** icon next to the code. The Edit Code dialog appears.
7. Click **Delete**. The code no longer appears in the [Code Type] Codes list.

Incident Subcodes

Once you have created an incident code, you can then create incident subcodes to further define the incident code. There is no limit to the number of subcodes you can create for each incident code. For example, using the code type of Location, you can create an On School Property incident code. Then, create subcodes such as Athletic Field, Cafeteria, and Playground to further define the On School Property code. For more information about incident codes, see *Incident Codes*.

Code Type	Code	Subcode
Location	On School Property	Athletic Field Cafeteria Playground

How to Add an Incident Subcode

Use this procedure to add an incident subcode. Add as many incident subcodes as needed per incident code.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.

3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select the appropriate code type. The Incident Management Code & Subcode Configuration page displays a list of [Code Type] Codes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

5. From the [Code Type] Codes list, select the code for which you want to create a subcode. The selected code appears highlighted. If any subcodes have already been created for the code, the code expands to display the list of subcodes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

6. Click the **Plus (+)** button for the selected code. The Add New Subcode dialog appears.
7. Use the following table to enter information in the applicable fields:

Field	Description
Subcode	Enter the name of the subcode. **Note**: This is a required field.
This Action Affects Attendance	Do one of the following: • Select the checkbox to indicate this action affects attendance. • Leave the checkbox blank to indicate this action does not affect attendance. **Note:** This field only appears for Action Subcodes.
Short Description	Enter a short description for this subcode.
Full Description	Enter a full description for this subcode.

State Detail Report Code	Enter the state detail report code. This code can be specified by the state department of education, or it can be a district-defined code (for example, dress code violations with several subcodes defined for the type of violation). For state-defined codes, see your PowerSchool state reporting setup guide.
Display Order	Enter the order in which you want the code displayed on the pop-up menu or Incident Detail page (depending on the parent code type).
State Reportable	Select to mark this code type reportable to the state department of education.
Police Reportable	Select to mark this code type reportable to the local police.
Allow Comment	Select the checkbox to include a comment field for the selected subcode providing the ability to enter additional information about the subcode. If the **Allow Comment** checkbox is selected, do one of the following: • Select the **Make this Comment Mandatory** checkbox to make entering a comment required. • Deselect the **Make this Comment Mandatory** checkbox to make entering a comment optional.
Policy Description	Enter any policy-related information that you want to communicate to users who will be working with this subcode.

8. Click **Submit**. The new subcode appears under the selected code.
9. Repeat Step 5 through Step 8 for each additional subcode.

How to Edit an Incident Subcode

Use this procedure to edit an incident subcode.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select the appropriate code type. The Incident Management Code & Subcode Configuration page displays a list of [Code Type] Codes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

5. From the [Code Type] Codes list, select the code that contains the subcode you want to edit. The selected code appears highlighted and expands to display the list of subcodes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

6. Select the subcode you want to edit. The selected code appears highlighted.
7. Click the **Pencil** icon next to the subcode. The Edit Subcode dialog appears.
8. The following fields display as editable:
   - **Subcode**
   - **Short Description**
   - **Full Description**
   - **State Detail Report Code**
   - **Display Order**
   - **State Reportable**
   - **Police Reportable**
9. Edit the information as needed. For field descriptions, see *How to Add an Incident Subcode*.
10. Click **Submit**. The subcode without the Pencil icon appears under the selected code.

How to Delete an Incident Subcode

Use this procedure to delete an incident subcode that may have been created in error or that is no longer in use.

Note: If an incident subcode is associated to an incident, it cannot be deleted. First remove the incident subcode from all incidents using the subcode and then it may be deleted. For more information, see *How to Create a Discipline Incident*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select the appropriate code type. The Incident Management Code & Subcode Configuration page displays a list of [Code Type] Codes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

5. From the [Code Type] Codes list, select the code that contains the subcode you want to delete. The selected code appears highlighted and expands to display the list of subcodes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

6. Select the subcode you want to delete. The selected code appears highlighted.
7. Click the **Pencil** icon next to the subcode. The Edit Subcode dialog appears.
8. Click **Delete**. The subcode no longer appears under the selected code.

Secondary Incident Subcodes

When working with Behavior Codes, you can create up to four levels of subcodes for each Behavior Code created.

How to Add a Secondary Incident Subcode

Use this procedure to add a secondary incident subcode to a Behavior Code subcode.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.

3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select **Behavior Codes**. The Incident Management Code & Subcode Configuration page displays a list of Behavior Codes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

5. From the Behavior Codes list, select the code you want to add a secondary subcode to. The selected code appears highlighted. If any subcodes have already been created for the code, the code expands to display the list of subcodes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

6. Select the subcode you want to add a secondary subcode to. The selected subcode appears highlighted. If any secondary subcodes have already been created for the subcode, the subcode expands to display the list of secondary subcodes.
7. Click the **Plus (+)** button for the selected subcode. The Add New Subcode dialog appears.
8. Use the following table to enter information in the applicable fields:

Field	**Description**
Subcode	Enter the name of the subcode. **Note**: This is a required field.
Short Description	Enter a short description for this subcode.
Full Description	Enter a full description for this subcode.
State Detail Report Code	Enter the state detail report code. This code can be specified by the state department of education, or it can be a district-defined code (for example, dress code violations with several subcodes defined for the type of violation). For state-defined codes, see your PowerSchool state reporting setup guide.

Display Order	Enter the order in which you want the code displayed on the pop-up menu or Incident Detail page (depending on the parent code type).
Severity	Enter the severity of the behavior. For state-defined severity codes, see your PowerSchool state reporting setup guide.
State Reportable	Select to mark this code type reportable to the state department of education.
Police Reportable	Select to mark this code type reportable to the local police.
Allow Comment	Select the checkbox to include a comment field for the selected subcode providing the ability to enter additional information about the subcode. If the **Allow Comment** checkbox is selected, do one of the following: • Select the **Make this Comment Mandatory** checkbox to make entering a comment required. • Deselect the **Make this Comment Mandatory** checkbox to make entering a comment optional.
Policy Description	Enter any policy-related information that you want to communicate to users who will be working with this subcode.

9. Click **Submit**. The new secondary subcode appears under the selected subcode.
10. Repeat Step 6 through Step 9 for each additional secondary subcode.

How to Edit a Secondary Incident Subcode

Use this procedure to edit a secondary incident subcode of a Behavior Code subcode.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.

3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select **Behavior Codes**. The Incident Management Code & Subcode Configuration page displays a list of Behavior Codes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

5. From the Behavior Codes list, select the code you want to add a secondary subcode to. The selected code appears highlighted. If any subcodes have already been created for the code, the code expands to display the list of subcodes.

   Note: Click the arrow next to code to expand the list. Click the arrow again to condense the list.

6. Select the subcode that contains the secondary subcode you want to edit. The selected subcode appears highlighted. If any secondary subcodes have already been created for the subcode, the subcode expands to display the list of secondary subcodes.
7. Select the secondary subcode you want to edit. The selected secondary subcode appears highlighted.
8. Click the **Pencil** icon next to the secondary subcode. The Edit Subcode dialog appears.
9. Edit the information as needed. For field descriptions, see *How to Add a Secondary Incident Subcode*.
10. Click **Submit**. The subcode without the Pencil icon appears under the selected code.

How to Delete a Secondary Incident Subcode

Use this procedure to delete a secondary incident subcode that may have been created in error or that is no longer in use.

Note: If a secondary incident subcode is associated to an incident, it cannot be deleted. First remove the secondary incident subcode from all incidents using the subcode and then it may be deleted. For more information, see *How to Create a Discipline Incident*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.

3. Click **Code & Subcode Setup**. The Incident Management Code & Subcode Configuration page displays the Code Types list.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

4. From the Code Types list, select **Behavior Codes**. The Incident Management Code & Subcode Configuration page displays a list of Behavior Codes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

5. From the Behavior Codes list, select the code you want to add a secondary subcode to. The selected code appears highlighted. If any subcodes have already been created for the code, the code expands to display the list of subcodes.

   Note: Click the arrow to expand the list. Click the arrow again to condense the list.

6. Select the subcode that contains the secondary subcode you want to delete. The selected subcode appears highlighted. If any secondary subcodes have already been created for the subcode, the subcode expands to display the list of secondary subcodes.
7. Select the secondary subcode you want to delete. The selected secondary subcode appears highlighted.
8. Click the **Pencil** icon next to the secondary subcode. The Edit Subcode dialog appears.
9. Click **Delete**. The secondary subcode no longer appears under the selected subcode.

Incident Types

Once you have created incident codes and subcodes, you then must create incident types. Using incident types, you can control which users can view and enter specific types of incidents. There is no limit to the number of incident types you can create. For example, create a **Counselors** incident type. Then, use the security settings to allow a specific group to view and create the Counselors incident type. The incident types you define appear on the **Incident Type** pop-up menu on the Incident Detail page.

How to Add an Incident Type

Use this procedure to add an incident type. Add as many incident types as needed.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Incident Types**. The Incident Types page appears.
4. Click **Add New Incident Type**. A blank **Name** field appears on the page.
5. Enter the new incident type in the **Name** field.
6. Click **Submit**. The Incident Management Setup page appears.

How to Edit an Incident Type

Use this procedure to edit an incident type.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Incident Types**. The Incident Types page appears.
4. Edit the information as needed.
5. Click **Submit**. The Incident Management Setup page appears.

How to Delete an Incident Type

Use this procedure to delete an incident type that may have been created in error or that is no longer in use.

Note: If an incident type is associated to an incident, it cannot be deleted. First remove the incident type from all incidents using the type and then it may be deleted. For more information, see *How to Create a Discipline Incident*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Incident Types**. The Incident Types page appears.
4. Click the **Red X** icon next to the **Name** field you want to delete. The field appears dimmed on the page.
5. Click **Submit**. The Incident Management Setup page appears.

How to Change the Display Order of Incident Types

Use this procedure to change the order in which the incident types you created on the **Incident Type** pop-up menu on the Incident Detail page display.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Incident Management**. The Incident Management Setup page appears.
3. Click **Incident Types**. The Incident Types page appears.
4. Click and hold the **Horizontal Three-Line** icon and drag up or down to change the display order of the incident type fields.
5. Click **Submit**. The new display order is saved, and the updated order appears on the Incident Detail page and the Edit Group page.

Search and Entry

Incident Data Grid

The Incident Data Grid is the central point from which you can quickly and easily view incidents for your school or district, as well as create a customized search filter to locate specific existing incidents. When signed in to at the school level, you can view incidents that include a participant from that school or incidents that originated at that school for the assigned incident code types. When signed in to at the district level, you can view incidents at all schools for the assigned incident code types.

Note: Information on this page displays based on your security settings.

How to Search for a Student's Existing Discipline Incidents

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Incidents** from the student pages menu. The Incident List page appears for that student.
3. To continue, see Step 3 of *How to Search for Existing Discipline Incidents*.

How to Search for Existing Discipline Incidents

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Use the following table to enter information in the Incident Information section:

Field	Description
Time Frame	Use the pop-up menu to indicate the time frame for which you want to view incidents: • **Current Calendar Year** (appears if at district level) • **Current School Year** (appears if at school level) • **Prior Calendar Year** (appears if at district level) • **Prior School Year** (appears if at school level) • **Current Month** • **Prior Month** • **Current Week**

	• **Prior Week** • **Date Range** • **Specific Date** **Note:** At the school level, the default is set to **Current School Year**. At the district level, the default is set to **Current Calendar Year**. If **Date Range** is selected, enter or select a **Start Date** and **End Date** and then click **Apply**. If **Specific Date** is selected, enter or select a date and then click **Apply**.

Incident Element	Use the pop-up menu to indicate the way in which you want to view incident counts:
	
	• **Action**
	• **Behavior**
	• **Custom**
	
	To customize your Incidents Counts by Action view:
	
	1. Choose **Action** from the pop-up menu.
	2. Click the button next to the pop-up menu. The Edit Tile Configuration section appears.
	3. For each tile you want to customize, choose one of the following:
	    • **Hide** - Removes the tile from the view. The next time the view is accessed, the tile will not appear.
	    • **Any** to filter by a code and its subcodes
	    • A single subcode
	4. Click **Save**.
	
	Note: Click **Cancel** to cancel customizations. Click **Reset Defaults** to delete customizations.
	
	To customize your Incidents Counts by Behavior view:
	
	1. Choose **Behavior** from the pop-up menu.
	2. Click the button next to the pop-up menu. The Edit Tile Configuration section appears.

	3. For each tile you want to customize, choose one of the following: • **Hide** - Removes the tile from the view. The next time the view is accessed, the tile will not appear. • **Any** to filter by a code and its subcodes • A single subcode 4. Click **Save**. **Note:** Click **Cancel** to cancel customizations. Click **Reset Defaults** to delete customizations. To customize your Incidents Counts view: 1. Choose **Custom** from the pop-up menu. 2. Click the button next to the pop-up menu. The Edit Tile Configuration section appears. 3. For each tile you want to customize, choose one of the following: • **Hide** - Removes the tile from the view. The next time the view is accessed, the tile will not appear. • **Action** • **Behavior** 4. If **Action** or **Behavior** is selected, choose one of the following from the second pop-up menu: • **Hide** - Removes the tile from the view. The next time the view is accessed, the tile will not appear. • **Any** to filter by a code and its subcodes • A single subcode 5. Click **Save**. **Note:** Click **Cancel** to cancel customizations. Click **Reset Defaults** to delete customizations.
[Incident Category]	The tiles display the top ten counts for each incident category. Click a tile to switch to that filter. Click again to remove that filter. **Note:** Incident category tiles appear in alphabetical order.
Create New Incident	Click to create a new incident. For more information, see *How to Create a Discipline Incident*.

4. Use the following table to enter information in the Filter section:

   Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	Description
[Incident Element]	The first row of the filter displays the action or behavior based on the selected tile. This indicates that the incidents currently on display in the grid have at least one related matching action or behavior.
ID	To further narrow the list of incidents by the ID: 1. Click the **Add (+)** button. 2. Choose **ID** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Enter the entire ID number of the incident in the search field. Partial IDs cannot be entered. 5. Click **Apply**.
Title	To further narrow the list of incidents by the title: 1. Click the **Add (+)** button. 2. Choose **Incident Title** from the first pop-up menu. 3. Enter the title of the incident or incidents in the search field. Partial titles can be entered, which do not require a wild character. 4. Click **Apply**.
Incident Type	To further narrow the list of incidents by the incident type: 1. Click the **Add (+)** button. 2. Choose **Incident Type** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Choose an incident type from the third pop-up menu. 5. Click **Apply**.

Incident Location	To further narrow the list of incidents by the incident location: 1. Click the **Add (+)** button. 2. Choose **Incident Location** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Choose an incident location from the third pop-up menu. 5. Click **Apply**.
School	To further narrow the list of incidents by the school: 1. Click the **Add (+)** button. 2. Choose **School** from the first pop-up menu. 3. Choose a school from the second pop-up menu. 4. Click **Apply**. **Note:** This filter only appears at the district level. **Note:** If field level security has been applied to School, this filter option is not available.
Action	To further narrow the list of incidents by the action: 1. Click the **Add (+)** button. 2. Choose **Action** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **Any** to filter by a code and its subcodes • A single subcode 4. Click **Apply**.
Attribute	To further narrow the list of incidents by the attribute: 1. Click the **Add (+)** button. 2. Choose **Attribute** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **Any** to filter by a code and its subcodes • A single subcode

	4. Click **Apply**.
Behavior	To further narrow the list of incidents by the behavior: 1. Click the **Add (+)** button. 2. Choose **Behavior** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **Any** to filter by a code and its subcodes • A single subcode 4. Click **Apply**.
Current Grade Level	To further narrow the list of incidents by the current grade level: 1. Click the **Add (+)** button. 2. Choose **Current Grade Level** from the first pop-up menu. 3. Choose a grade level from the second pop-up menu. 4. Click **Apply**.
Object	To further narrow the list of incidents by the object: 1. Click the **Add (+)** button. 2. Choose **Object** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **Any** to filter by a code and its subcodes • A single subcode 4. Click **Apply**.
Participant: Any	To further narrow the list of incidents by the any participant of the incident: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Any** from the first pop-up menu. 3. Enter the name or a portion of the participant's name.

	4. Click **Apply**. **Note:** Format must be Last, First.
Participant: Offender	To further narrow the list of incidents by the incident offender: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Offender** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.
Participant: Reporter	To further narrow the list of incidents by the incident reporter: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Reporter** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.
Participant: Victim	To further narrow the list of incidents by the incident victim: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Victim** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.

Participant: Witness	To further narrow the list of incidents by the incident witness: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Witness** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

5. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	Description
[Checkboxes]	Do one of the following: • Select the checkbox in the header row to select all incidents. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all incidents. • Select the checkbox for each incident you want to work with.
ID	Unique sequential number generated by PowerSchool when the incident is created. Click to view the Incident Detail page.
Title	A short description of the incident. Click to view the Incident Detail page.
Incident Type	The type of incident that occurred.

Incident Date	The date and time the incident occurred.
Incident Location	The location where the incident occurred.
School	The school at which the incident occurred. **Note:** This column only appears at the district level. **Note:** If field level security has been applied to School, this column appears masked.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.
Download	To download the incident information, click the arrow and select one of the following from the pop-up menu: • **Comma-Separated Value (CSV)** • **Excel Spreadsheet (XLSX)** • **Print Document Format (PDF)** **Note:** A checkmark appears next to your selection. **Note:** The PDF format is restricted to a maximum of 1000 records. **Note:** Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format. **Note:** If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language.

6. Use the following table to update the current student selection:

Field	**Description**

Select Participants with These Roles	1. Select one of the following checkboxes: • **Any Role** • **Offender** • **Reporter** • **Victim** • **Witness** 2. Do one of the following: • Click **Add to Current Selection** to add the filtered list of students to your current student selection. • Click **Set Current Selection** to make the filtered list of students your current student selection.

Discipline Incidents

Using the Incident Detail page, you can create discipline incidents. The Incident Detail page consists of the following two sections, which are used to enter specific information regarding the discipline incident: Incident Description and Incident Builder. These sections can be expanded and collapsed to help make entering and reviewing information on the page more manageable. Click the section title to expand or collapse the section on the page.

How to Create a Discipline Incident

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Click **Create New Incident**. The Incident Detail page appears.

   Note: If the **Create New Incident** button does not appear, either the incident types have not yet been defined or you do not have the appropriate security permissions. For more information, see *Incident Types* and *How to Edit Security Groups*.

4. Scroll to the **Incident Description** section. If needed, click the section title to expand the section.
5. Use the following table to enter field information in the Incident Description section:

Field	Description

School	Use the pop-up menu to select the school or district office where the incident occurred. **Note:** This pop-up menu appears only when entering a new incident at the district level.
Incident Type	Use the pop-up menu to select the type of incident. This is a required field.
Incident Date	Click the **Calendar** icon to open the calendar menu. Click the date the incident occurred. Use the **Arrow** icons to select a different month. Use the **Time** pop-up menus to enter the time the incident occurred.
Time Frame [Code]	Use the pop-up menu to select the time code which best describes the period of time that the incident took place.
Time Frame [Subcode]	If the time code you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose a subcode to provide further detail about the period of time that the incident took place.
Time Frame Comment	If the time frame code or subcode you selected allows for comments to be entered, enter additional information. This field may be required.
Title	Enter a title for the incident. This title appears in the search Results section on the Incident List page when searching for an incident.
Description	Enter a brief description of the incident.
Location [Code]	Use the pop-up menu to select the location code which best describes the site or setting where the incident took place.
Location [Subcode]	If the location code you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose a

	subcode to provide further detail about the site or setting where the incident took place.
Location Comment	If the location code or subcode you selected allows for comments to be entered, enter additional information. This field may be required.
Location Description	Enter additional details about the site or setting where the incident took place.
Prepared By	Enter your name.
Financial Impact	Enter a dollar figure for the financial impact to the school of the incident.

6. Scroll to the **Incident Builder** section. If needed, click the section title to expand the section.
7. Click the **Plus (+)** button next to Participants. The Search for Student, Staff, or Other Participants dialog appears.
8. Use the following table to enter information in the applicable fields:

Field	**Description**
Last Name	Enter the last name of the student, staff, or other participant. Partial names can be entered.
Type	Use the pop-up menu to indicate which group you want to search by choosing **Students**, **Staff**, or **Others**.
Grade Level	If you selected **Students**, use the pop-up menu to limit the student results by grade level, or select **All** to search all grade levels.
Only Active	If you selected **Students** or **Staff**, select the checkbox to limit the search to students currently enrolled and staff members with a status of active.

Context	Use the pop-up menu to indicate the school or district office you want to search.

9. Click **Search** to generate the search results based on the input criteria.

   Note: Use the pop-up menu below to limit the size of the search results to **5**, **10**, **15**, or **20** results per page. Click **<<first**, **<prev**, **next>**, **last>>** to view all of the search results.

10. Click the name of the person in the Results section that you want to add as the participant.

    Note: If the name of the person you want to add as a participant does not appear in the Results section because the participant has yet to be added to PowerSchool or does not belong to the school or district office, click **Create Other**. The Add Other Participant dialog appears. Use the following table to enter information in the applicable field:

Field	**Description**
Mark Person as Unknown	Select the checkbox to mark the participant as unknown. This special attribute assists with tracking individuals where identifying details (such as name) are not known.
First, Middle, Last	Enter the first, middle and last name of the participant.
Position	Enter the staff position or title, if applicable.
Age	Enter the age of the participant.
Gender	Use the pop-up menu to select the gender of the participant.

11. Click **Add**. The Add Participant Attributes dialog appears.
12. Use the following table to enter field information in the Attributes section:

Field	**Description**

[Attribute Code]	Click the **Plus (+)** button next to Attributes to display the attribute pop-up menu. Choose the attribute which best applies to the participant.
[Attribute Subcode]	If the attribute you selected has one or more subcodes associated to it, the attribute subcode pop-up menu appears. Choose the attribute subcode which best applies to the participant.
Attribute Code Comment	If the code or subcode you selected allows for comments to be entered, enter additional information. This field may be required.

Note: To remove an attribute, click the **Minus (-)** button next to the attribute pop-up menu you want to remove.

13. Repeat Step 12 for each attribute you want to add.
14. Use the following table to enter field information in the Select Role(s) section:

Field	Description
[Role Code]	Choose the role from the pop-up menu which best describes the participant's involvement in the incident: • **Reporter** • **Victim** • **Offender** • **Witness** By default **Reporter** appears.
[Role Subcode]	If the role code you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose the subcode to provide further detail about the participant's involvement in the incident.
Role Code Comment	If the code or subcode you selected allows for comments to be entered, enter additional information. This field may be required.

Note: To remove a role, click the **Minus (-)** button next to role pop-up menu you want to remove.

15. Repeat Step 14 for each role you want to add to the selected participant. Up to four roles may be added per participant.
16. Click **Add Participant Attributes**. The Add Participant Attributes dialog closes. Participant information appears in the respective roles.
17. Repeat Step 7 through Step 16 for each participant you want to add to the incident.
18. Add the following incident elements as needed: Action, Object, Behavior, and Attribute. For detailed information, see *How to Add an Incident Elements*.
19. Assign incident elements as needed. For detailed information, see *How to Assign an Incident Elements*.
20. Click **Submit Incident** when all sections on the Incident Details page are completed. The Incident List page appears.

How to Edit a Discipline Incident

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for and click the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, edit the applicable fields. For field descriptions, see *How to Create a Discipline Incident*.
5. Edit incident elements as needed. For detailed information, see *Incident Elements*.
6. Scroll to the **Change Reason** section. If needed, click the section title to expand the section.
7. Enter a brief description of the edits made to the incident.
8. Scroll to the **Attendance Related Actions** section. If needed, click the section title to expand the section.

   Note: This section only appears if any incident with an action code/subcode that affects attendance has been previously submitted.

   The following information appears:

   - Name
   - Action
   - Begin Date
   - End Date
   - Duration Code
   - Assigned Duration
   - Actual Duration
   - Attendance - Click to edit attendance information. For more information, see *Attendance*.

9. Click **Submit Incident**. The Incident List page appears.

How to Delete a Discipline Incident

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click **Delete**. The Delete Incident dialog appears.
5. Click **Delete** to remove the incident.

How to View a Discipline Incident Change History

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for and click the incident you want to edit.
4. On the Incident Detail page, click **View Change History**. The Change History dialog appears.
5. Do one of the following:
    - Click a date to view the details of the change to a specific entry.
    - Click **Expand All Items** to view all entries.
6. Click **X** to close the dialog.

Incidents Elements

Incident elements consist of Actions, Behaviors, Objects and incident Attributes. They represent additional reportable detail about an incident and can be related to participants or the incident itself. Examples of an action would be a suspension or expulsion. Behaviors are typically the offenses that occurred such as an assault. Objects are the items that would have been used during the incident such as a weapon. Attributes are details about the incident itself and are not directly related to any participant. All of these elements are defined at the district level.

How to Add an Incident Elements

Note: Certain codes/subcodes may have a Policy associated with them indicating instructions for working with the codes/subcodes.

Add an Action

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Plus (+)** button next to Incident Elements and select **Add Action**. The Add Action dialog appears.
5. Use the following table to enter field information in the applicable fields:

Field	Description
Action Code	Use the pop-up menu to select the applicable action code. **Note:** A warning message may appear if the selected code affects attendance.
Action Date Range	Enter a date range in which the action occurs: • **Begin Date** - Click the Calendar icon to open the calendar menu. Click the begin date for the action. Use the Arrow icons to select a different month. • **End Date** - Click the Calendar icon to open the calendar menu. Click the end date for the action. Use the Arrow icons to select a different month.
Action Taken Detail	Enter detailed information regarding the action taken.
Actual Resolution Date	Click the **Calendar** icon to open the calendar menu. Click the resolution date for the action. Use the **Arrow** icons to select a different month.
Duration Code	Use the pop-up menu to select the duration code of the action, such as hours, calendar days, or school days. This value is applied to all duration fields.
Assigned Duration	Enter the assigned duration of the action as it applies to the selected Duration Unit. For example, if the action is a three-day suspension from school, enter **3**.

Actual Duration	Enter the actual duration of the action as it applies to the selected Duration Unit.
Duration Notes	Enter any additional information regarding the duration of the action.
Action Change Reason	Enter the reason why the duration of the action changed, if applicable.
Action Change Code	Use the pop-up menu to choose the action change code which best describes the reason the change was made.
Action Attributes	Enter action attribute information as needed. **Note:** The information that appears in this section is based on the number of action attributes created during setup and the data type selected for each action attribute. Action attributes may appear as a text, number, or date field or as a yes/no or subcode selection pop-up menu. For more information, see *Code Types* and *How to Add an Incident Code*. **Note:** A policy description may appear indicating instructions for working with the codes/subcodes.

6. Click **Add Action**. The Add Action dialog closes. The entered information appears in the Incident Element section of the Incident Detail page.
7. Repeat previous steps for each action you want to add.

Add an Object

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Plus (+)** button next to Incident Elements and select **Add Object**. The Add Object dialog appears.
5. Use the following table to enter field information in the applicable fields:

Field	Description
Object Code	Use the pop-up menu to select the applicable object code. Upon selecting a code, a subcode pop-up menu appears. Use the pop-up menu to select the applicable subcode.
Description	Enter a brief description of the object.
Quantity	Enter the number of objects associated with this incident.

6. Click **Add Object**. The Add Object dialog closes. The entered information appears in the Incident Element section of the Incident Detail page.
7. Repeat previous steps for each object you want to add.

Add a Behavior

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Plus (+)** button next to Incident Elements and select **Add Behavior**. The Add Behavior dialog appears.
5. Use the following table to enter field information in the applicable fields:

Field	Description
Behavior Code	Use the pop-up menu to select the appropriate behavior code.
[Behavior Subcode]	If the behavior you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose a subcode from the pop-up menu to provide further detail about the behavior.
[Behavior Subcode 2]	If the behavior you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose a subcode from the pop-up menu to provide further detail about the behavior.

[Behavior Subcode 3]	If the behavior you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose a subcode from the pop-up menu to provide further detail about the behavior.
[Behavior Subcode 4]	If the behavior you selected has one or more subcodes associated to it, the subcode pop-up menu appears. Choose a subcode from the pop-up menu to provide further detail about the behavior.
Behavior Code Comment	If the code or subcode you selected allows for comments to be entered, enter additional information. This field may be required.
Primary Behavior	Select the checkbox to indicate principal behavior associated to the incident. Certain states require that the most important behavior be identified. Refer to your state requirements to determine how to decide which behavior is the primary one.

6. Click **Add Behavior**. The Add Behavior dialog closes. The entered information appears in the Incident Element section of the Incident Detail page.
7. Repeat previous steps for each behavior you want to add.

Add an Attribute

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Plus (+)** button next to Incident Elements and select **Add Attribute**. The Add Attribute dialog appears.
5. Select all the applicable attributes for this incident.

   Note: A policy description may appear indicating instructions for working with the codes/subcodes.

6. Click **Add Attributes**. The Add Attribute dialog closes. The entered information appears in the Incident Element section of the Incident Detail page.

How to Assign an Incident Element

Attributes are assigned at the incident level and therefore cannot be assigned to a participant.

Assign an Action

Actions can only be assigned to one participant or behavior, but you can assign multiple actions if needed.

- Drag and drop an action to the appropriate participant name. The action appears below the participant's name.
- Drag and drop an action to the appropriate behavior. The action appears below the behavior.

Note: If you inadvertently submit an incident with an action that is associated to the incorrect behavior, reopen the incident and then drag and drop the action to the correct participant or behavior and resubmit.

Assign an Object

Objects can be assigned to multiple participants.

- Drag and drop an object to the appropriate participant name. The object appears below the participant's name.

Assign a Behavior

Behaviors can only be assigned to one participant, but you can assign multiple behaviors if needed.

- Drag and drop a behavior to the appropriate participant name. The behavior appears below the participant's name.

How to Edit an Incident Element

Note: Certain codes/subcodes may have a Policy associated with them indicating instructions for working with the codes/subcodes.

Edit an Action

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.

3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Pencil** icon next to the action you want to edit. The Update Actions dialog appears.
5. Edit the applicable fields. For field descriptions, see *How to Create a Discipline Incident: Add an Action*.
6. Click **Update Action**.
7. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
8. Enter a brief description of the edits made to the incident.
9. Click **Submit Incident**. The Incident List page appears.

Edit an Object

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Pencil** icon next to the object you want to edit. The Update Actions dialog appears.
5. Edit the applicable fields. For field descriptions, see *How to Create a Discipline Incident: Add an Object*.
6. Click **Update Action**.
7. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
8. Enter a brief description of the edits made to the incident.
9. Click **Submit Incident**. The Incident List page appears.

Edit a Behavior

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Pencil** icon next to the behavior you want to edit. The Update Actions dialog appears.
5. Edit the applicable fields. For field descriptions, see *How to Create a Discipline Incident: Add a Behavior*.
6. Click **Update Action**.

7. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
8. Enter a brief description of the edits made to the incident.
9. Click **Submit Incident**. The Incident List page appears.

Edit an Attribute

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Pencil** icon next to the attribute you want to edit. The Update Actions dialog appears.
5. Edit the applicable fields. For field descriptions, see *How to Create a Discipline Incident: Add an Attribute*.
6. Click **Update Action**.
7. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
8. Enter a brief description of the edits made to the incident.
9. Click **Submit Incident**. The Incident List page appears.

How to Delete Elements

Note: Certain codes/subcodes may have a Policy associated with them indicating instructions for working with the codes/subcodes.

Delete an Action

Note: If the action you are deleting is associated with a participant, the action will be retained for future use. If the action you are deleting is not associated with a participant, the action will be permanently removed.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Minus (-)** icon next to the action you want to delete. A confirmation dialog appears.
5. Click **OK**.

6. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
7. Enter a brief description of the edits made to the incident.
8. Click **Submit Incident**. The Incident List page appears.

Delete an Object

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Minus (-)** icon next to the object you want to delete. A confirmation dialog appears.
5. Click **OK**.
6. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
7. Enter a brief description of the edits made to the incident.
8. Click **Submit Incident**. The Incident List page appears.

Delete a Behavior

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.
4. On the Incident Detail page, click the **Minus (-)** icon next to the behavior you want to delete. A confirmation dialog appears.
5. Click **OK**.
6. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
7. Enter a brief description of the edits made to the incident.
8. Click **Submit Incident**. The Incident List page appears.

Delete an Attribute

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Search for the incident you want to edit. For more information, see *How to Search for Existing Discipline Incidents*.

4. On the Incident Detail page, click the **Minus (-)** icon next to the attribute you want to delete. A confirmation dialog appears.
5. Click **OK**.
6. On the Incident Detail page, click **Change Reason** to expand the change reason section of the page if needed.
7. Enter a brief description of the edits made to the incident.
8. Click **Submit Incident**. The Incident List page appears.

InfoSnap User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool has a close integration with InfoSnap, which allows authorized PowerSchool users to seamlessly transition from PowerSchool into InfoSnap. InfoSnap provides custom online admissions and registration solutions. For details on enabling the InfoSnap integration, go to www.InfoSnap.com/About/PowerSchool.

Get Information About InfoSnap

Using the InfoSnap link in PowerSchool, you can access the InfoSnap web site to learn more about InfoSnap.

How to Get Information About InfoSnap

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **InfoSnap**. The InfoSnap web site launches in a separate window (or tab depending on your browser setting).
5. When you are finished viewing the InfoSnap web site, close the window (or tab depending on your browser setting).

Setup

Before you can begin using InfoSnap, perform the following setup items:

- Install Plugin
- View General Plugin Information (optional)
- View SSO (optional)
- Manage Link Details (optional)
- Configure School Access (optional)
- View OAuth Client Credentials (optional)
- Enable Plugin
- Enable Customizations

Note: See the *Plugin Management User Guide* for procedures that do not appear in this guide.

Enable Customizations

Once you have performed the above setup items, you will then need to enable customizations if the plugin files includes custom pages. For more information, see *System Settings*.

Note: When customizations is disabled, the **Information** icon (circle with lowercase "i") does not appear next to the **InfoSnap** link in the PowerSchool Student and Parent portal.

How to Enable Customization

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Customization**. The Customization page appears.
4. Select the **Customization Enabled** checkbox to prevent overwriting custom pages on your server when updating PowerSchool.
5. Click **Synchronize Custom web_root** to manually synchronize the custom pages with the Web root folder on your server. The page refreshes.
6. Click **Submit**. The System Settings page appears.

Working With InfoSnap

Once InfoSnap is configured, the InfoSnap link appears in PowerSchool or the PowerSchool Student and Parent portal based on the navigation links defined in the InfoSnap configuration file. The navigation links may appear as "InfoSnap" or some other name as defined in the InfoSnap configuration file. Using the InfoSnap link, users can launch InfoSnap from within PowerSchool while keeping their PowerSchool session active allowing them to work in both applications simultaneously.

Launch InfoSnap

Use this procedure to launch InfoSnap in PowerSchool or the PowerSchool Student and Parent portal.

Note: The InfoSnap link only appears if enabled, if navigation links for PowerSchool or the PowerSchool Student and Parent portal are defined in the InfoSnap configuration file, and if the selected school has been granted access to the InfoSnap link.

How to Launch InfoSnap from the Navigation Bar

1. Do one of the following:
    - Sign in to PowerSchool.
    - Sign in to the PowerSchool Student and Parent portal.

    Note: For more information about signing in to PowerSchool, see *The Basics User Guide* available on PowerSource. For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Parent Portal User Guide* available on PowerSource.

2. Click the **Applications** button (an upward-right arrow) in the navigation toolbar. The Applications drawer slides into view.
3. Click the **[InfoSnap]** link. InfoSnap launches in a separate window (or tab depending on your browser settings).

    Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

    Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

4. When you are finished working in InfoSnap, be sure to sign out of InfoSnap.

5. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

How to Launch InfoSnap from the Main Menu

1. Do one of the following:
   - Sign in to PowerSchool.
   - Sign in to the PowerSchool Student and Parent portal.

   Note: For more information about signing in to PowerSchool, see *The Basics User Guide* available on PowerSource. For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Parent Portal User Guide* available on PowerSource.

2. If the **Information** icon (circle with lowercase "i") appears next to the **[InfoSnap]** link, you can click it to view information about InfoSnap. A pop-up displays InfoSnap information as defined in the InfoSnap plugin. When done viewing, click the x in the upper-right corner.
3. In the main menu on the left side of the page, choose **[InfoSnap]**. InfoSnap launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

4. When you are finished working in InfoSnap, be sure to sign out of InfoSnap.
5. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

LDAP User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

LDAP (Lightweight Directory Access Protocol) enables administrators to establish a single source for securely managing authentication for all users on the district network, including those using PowerSchool, PowerSchool Teacher, and the PowerSchool Student and Parent portal.

Setup

Configuration

In order for PowerSchool to authenticate users using an LDAP directory server, the LDAP directory server must be configured within PowerSchool.

Configuring the LDAP directory server consists of providing the server's address, port, SSL setting, and LDAP directory administrator credentials. It is possible to selectively enable or disable the use of LDAP for three groups of users: staff, teachers, and students. Each group of users enabled for LDAP must also have a domain context configured that identifies the root of the tree where each group of user accounts is located along with the name of the user ID attribute from the directory schema.

Once configured, the LDAP directory server synchronizes the usernames stored in PowerSchool's database with the sign in (user) IDs stored in your LDAP directory server.

Synchronization and Authentication

Directory synchronization is the process of synchronizing the usernames stored in PowerSchool's database with the sign in (user) IDs stored in your LDAP directory. For a user to successfully authenticate in PowerSchool via LDAP, the usernames must match in both PowerSchool and the LDAP Directory.

When LDAP is enabled, usernames are no longer directly editable through the PowerSchool user interface on either the Modify Info for Students or Security Settings for Teachers and Staff pages. Instead, you must use one of the Synchronization processes.

Synchronization can either be performed as a mass operation, using a selection of students or teachers and staff, or one at a time using the LDAP Lookup button on either the Modify Information or Security Settings pages. See *How to Synchronize Using LDAP Directory Synchronization*.

Set Up the LDAP Directory

Use the LDAP Directory Setup page to configure PowerSchool to authenticate by either Active Directory LDAP or Open Directory LDAP.

How to Set Up the LDAP Directory

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Security, click **LDAP Directory Setup**. The LDAP Directory Setup page appears.
3. Use the following table to enter information in the Server Configuration fields:

Field	Description
LDAP Server Hostname or IP Address	Enter the hostname or IP address of the LDAP directory server, such as **192.168.1.12**.
LDAP Port	Enter the TCP port to use, such as **636**.
Enable SSL (Recommended prior to enabling LDAP)	To enable SSL between PowerSchool and the LDAP Directory, do one of the following: • Select the **SSL Enabled (File System Keystore)** option if the LDAP server certificate has been added to either the cacerts or jssecerts files on the server. **Note:** This option is available for backwards compatibility. • Select the **SSL Enabled (PowerSchool Keystore)** option if the LDAP server certificate has been added via the Certificate Management Console. **Note:** It is strongly recommended that prior to enabling LDAP, SSL also be enabled.
Active Directory FQDN	If using Active Directory, enter the fully qualified domain name of the Active Directory Server, such as **ad.powerschool.com**. Typically this will be the same as the LDAP Server Hostname, but does not have to be. When authenticating against Active Directory, the Security Principal is of the form userID@fqdn. **Note:** When configuring LDAP for Open Directory, this field may be left blank.

LDAP Admin DN	Enter the distinguished name (DN) of an account in the LDAP Directory with read privileges within the directory, such as **cn=Administrator,cn=users,dc=ad,dc=powerschool,dc=com** The distinguished name can be the directory administrator account, but an account with read-only access is sufficient. This account is used for directory searches when attempting to synchronize usernames between PowerSchool and the Directory.
LDAP Admin Password	Enter the password for the Admin DN.
Maximum Active LDAP Connections (per node)	Enter the number of active simultaneous LDAP connections per node. **Note:** This number represents the maximum number of users that can simultaneously sign into PowerSchool using LDAP authentication per PowerSchool node. This does not represent the maximum number of users that can be logged into PowerSchool at any given time.

5. Click **Validate Server Connection** to establish an anonymous connection to the directory using the values entered on this page and to authenticate the connection using the Admin DN and Password credentials, if provided. A window displays indicating the success or failure of these operations.
6. If using Active Directory, click **Active Directory Defaults** to populate all schema configuration items with reasonable defaults based on the Server Configuration. If using Open Directory, click **Open Directory Defaults** to populate all schema configuration items with reasonable defaults based on the Server Configuration. If any of the Server Configuration information is missing or ambiguous, you will be prompted for clarification.
7. Use the following table to enter information in the Schema Configuration fields:

Field	**Description**
Enable LDAP	Select the Staff, Teachers, and Students checkboxes to enable LDAP Authentication. LDAP Authentication may be selectively enabled for three distinct groups of users: Staff, Teachers and Students. The remaining

	attributes, Domain Context and User ID Attribute, can be set for each user type. **Note:** It is strongly recommended that prior to enabling LDAP, SSL be enabled.
Domain Context	The Domain Context to which the user will bind when trying to authenticate, such as **cn=users,dc=ad,dc=powerschool,dc=com** for Staff, Teachers, and Students. This domain context is also used when performing LDAP Directory Synchronization activities. For example, if you are trying to synchronize the username for a student, the student domain context will be used as the base when searching the directory.
User ID Attribute	Specify which schema attribute to use when forming the distinguished name (DN) when the user attempts to sign in, such as **uid** for Staff, Teachers, and Students. For example, if the User ID Attribute is uid and the domain context is cn=users,dc=ldap,dc=powerschool,dc=com, then the DN for user jsmith becomes uid=jsmith,cn=users,dc=ldap,dc=powerschool,dc=com.

8. Click **Submit**. The Security page appears.

Synchronize Using LDAP Directory Synchronization

Use the LDAP Directory Synchronization page to synchronize PowerSchool Usernames with an LDAP directory server.

How to Synchronize Using LDAP Directory Synchronization

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **LDAP Directory Synchronization**. The LDAP Directory Synchronization page displays.

   The LDAP Directory Synchronization page acts as a hub for all of the synchronization processes. From this page, you can choose to synchronize the current selection of students or teachers and staff, all students (district wide), all students with blank usernames (district wide), all teachers (district wide), all staff (district wide), all teachers with blank usernames (district wide), or all staff with blank usernames (district wide).

Note: You can also invoke mass student synchronization from the Functions menu after establishing a selection of students. For more information, see *How to Perform Student LDAP Directory Synchronization*. Similarly, you can invoke mass teacher/staff synchronization from the Functions menu after establishing a selection of teachers and/or staff. For more information, see *How to Perform Staff LDAP Directory Synchronization*.

Once a selection is established and the LDAP Directory Synchronization process is selected, one of two pages appears, depending on whether you are working with students or teachers and staff. In either case, before the synchronization process begins, the expected user ID attribute displays, and you have the opportunity to change it before proceeding. The User ID attribute is the name of the schema element in the LDAP directory that holds the username. This is the value that is brought back into PowerSchool and stored in the appropriate username field in PowerSchool's database.

3. Click **Submit**. When you click submit, the synchronization process begins and each record in the selection is processed. The first and last name in each record is used to find an exact match in the directory. If no exact match is found, a second search is done using only the last name in an effort to find partial matches.

   If an exact match is found, the username in PowerSchool's database is compared to the username reported by the directory. If they are the same, no action is taken. If they differ, the value from the directory is stored in PowerSchool. All matching records are reported in the first section of the Synchronization Results.

   When processing an exact match for a teacher/staff record, the following logic applies. If the record represents a teacher, the Teacher Username will be checked and updated if necessary. And, if the teacher has access to the admin portion of PowerSchool, the Admin Username is also checked. If the record represents a staff member, the Admin Username is checked and updated if necessary.

   If partial matches are found, a list of the partial matches will be displayed in the exception portion of the Synchronization Results. A link will also be provided next to the record, which opens in a new browser window to allow manual lookup and synchronization.

   Records with no matches (either exact or partial) are reported in the exception portion of the Synchronization Results. For records with no matches, the appropriate users should be added to the LDAP directory or the first and last names should be checked to ensure that they match in PowerSchool and the Directory. Once the issue is corrected, the synchronization process can run again.

Perform Student LDAP Directory Synchronization

Use the LDAP Directory Synchronization page to synchronize PowerSchool Usernames with an LDAP directory server.

How to Perform Student LDAP Directory Synchronization

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **LDAP Directory Synchronization**. The LDAP Directory Synchronization page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Edit the **User ID Attribute**, as needed. For detailed information, see *Setup the LDAP Directory*.
5. Click **Submit**.

Work with LDAP

Staff

Note: Information in this section appears in the *Staff User Guide*.

How to Perform Staff LDAP Directory Synchronization

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **LDAP Directory Synchronization**. The LDAP Directory Synchronization page appears.
4. Edit the User ID Attribute as needed.
5. Click **Submit**.

How to Edit a Staff Member Security Settings

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. Use the following table to enter information in the fields:

Field	Description
Sign in to PowerTeacher	Select the checkbox if you want this staff member to be able to sign in to PowerTeacher Portal and PowerTeacher Gradebook.
Teacher Username	If you want this staff member to be able to access PowerTeacher, enter a username. If you do not, leave this field blank. **Note:** Use the **LDAP Enabled** checkbox next to the **Teacher Username** field to enable or disable LDAP Authentication for an individual staff member. For more information, see *LDAP*. **Note:** The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Teacher Username** (USERS.TEACHERLOGINID) and **LDAP Enabled**

	(USERS.TEACHERLDAPENABLED). For more information, see *Field Level Security*.
Teacher Password	If you entered a username in the **Teacher Username** field, enter the staff member's PowerTeacher password.
School Affiliations	Manage the schools you want this user to be affiliated with as a teacher/staff member. Selecting more than one school activates the **School** link on the navigation toolbar in the PowerTeacher Portal, and in PowerTeacher Gradebook (if applicable). For more information, see *How to Add School Affiliations*.

5. Click **Submit**. The Changes Recorded page appears.

How to Add School Affiliations

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the Teachers and School Staff section, click **Add** on the School Affiliations row. The Add Schools pop-up appears.
5. Select the checkbox next to each school you want to add.

   Note: You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection.

6. Select the **Staff Type** from the pop-up menu.
7. It is recommended that you assign a status to each staff member. This makes searching for and selecting staff members more efficient and can affect what directory the user is in for LDAP systems. To specify the staff member's status, choose one of the following from the pop-up menu:
   - **Not Assigned**
   - **Teacher**
   - **Staff**
   - **Lunch Staff**
   - **Substitute**
8. Click **OK**. The selected School and Staff Type appear on the Security Settings page. The Active checkbox is automatically selected.

9. Click **Submit**. The school associations appear on the Security Settings page.

How to Modify School Affiliations

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the School Affiliations section, deselect the **Active** checkbox next to the school for which you want to remove access.

   Note: Once you click **Submit**, the school still appears on the Security Settings page, but the access is no longer active.

5. Click on the **Staff Status** field for a specific school to change the status, if needed. Select the status from the pop-up menu.

   Note: The user's **Staff Status** at their home school is reported to LDAP servers regardless of their status at other schools.

6. Click the **Notes** icon in the Action column. The Notes pop-up appears. Enter any pertinent information about this school association for this staff account.
7. Click **Submit** to save changes.

How to Assign Admin Access

Use this procedure to assign access the administrative portion of PowerSchool.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Use the following table to enter information in the fields:

Field	Description
Sign in to Administrative	If you want this staff member to be able to sign in to PowerSchool, select the checkbox. Otherwise, leave the checkbox deselected.

Portion of PowerSchool	
Admin Username	If you want this staff member to be able to access the entire PowerSchool system, enter a username. If you do not, leave this field blank. **Note:** Usually, only school administrators, PowerSchool administrators, cafeteria personnel, guidance staff, and administrative staff members have access to PowerSchool. Teachers generally only have access to PowerTeacher Portal. **Note:** If LDAP is configured on your server, select the **LDAP Enabled** checkbox to enable or disable LDAP Authentication for an individual staff member. For more information, see *LDAP*. **Note:** Field level security may be used to restrict this information. The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Admin Username** (USERS.LOGINID) and **LDAP Enabled** (USERS.ADMINLDAPENABLED). For more information, see *Field Level Security*.
Admin Password	If you entered a username in the **Admin Username** field, enter the staff member's PowerSchool password.
Default Group	To assign the staff member to a security group, choose the appropriate group from the pop-up menu. This security group will be used throughout the administrative portion of PowerSchool unless overridden for a specific school by assigning a specific role. For more information, see *Role Assignments*. **Note:** Click the field name to view each group and its permissions in PowerSchool. For more information, see *How to Edit Security Groups*.
Allow Admin Sign in During These Times	Do one of the following: • Select **Any time** for no restrictions on when the staff member can sign in to PowerSchool.

	• Select **Allow this user's access from** and use the pop-up menus to choose the time range that the user is allowed to sign in to PowerSchool.
Allowed IPs	If you want this staff member to be able to use PowerSchool from certain computers only, enter the IP addresses of those computers in this field. This setting only affects the administrative portion of PowerSchool. **Note:** If you define more than one IP address, separate each address with a comma. If you want this staff member to be able to access PowerSchool from any computer, leave this field blank.
Roles and Schools	Manage role assignments for the user. For more information, see *Role Assignments*.

PowerSchool Student and Parent Portal Administration

PowerSchool Student and Parent portal Access IDs and passwords can be manually or automatically assigned individually or by group. It is important to note that in addition to a Student Username and Password, each student is assigned an Access ID and an Access Password. Unlike usernames and passwords, Access ID and Access Password are not accounts themselves, but are used to link a student to a parent account. Anyone with the Student's Access ID and Password can add that student to their account. Parent can use each student's Access ID and Access Password to link to their existing parent account, or when they first create their parent account.

Note: If LDAP is configured on your server, select the **Student LDAP Enabled** checkbox to enable or disable LDAP Authentication for an individual student. For more information, see *LDAP*.

Note: Field level security may be used to restrict this information. The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Student Username** (STUDENTS.STUDENT_WEB_ID) and **LDAP Enabled** (STUDENTS.LDAPENABLED). For more information, see *Field Level Security*.

How to Manually Assign an Access ID and Password for Linking to a Student Account

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. Use the following table to enter information in the Access Keys fields:

Field	Description
Access ID	Enter the Access ID that parent/guardians will use to link this student to their account.
Access Password	Enter the Access Password that parent/guardians will use to link this student to their account.

4. Click **Submit**. A confirmation message appears indicating the account is updated.

How to Manually Assign a Student's Username and Password

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. Use the following table to enter information in the Student Access Account fields:

Field	Description
Student Username	Enter the student’s user name. **Note:** This field appears as read-only if Unified Classroom is enabled. For more information, see *Unified Classroom Setup*.
Student Password	Enter the student’s password.

4. Click **Submit**. A confirmation message appears indicating the account is updated.

Localization Administration User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool provides a toolkit that makes it easy to translate the system into any language. This includes PowerTeacher, ReportWorks, labels on various pages, fields used for Student/Teacher/Staff searches, and configuration items like Attendance codes, course names and grade scale items. Online help for the Administrator/Student/Parent/Substitute/Teacher web pages can also be translated using the toolkit.

To support this, PowerSchool now uses Unicode, allowing you to enter student names with “ñ” or other non-English characters. The translation toolkit also makes it possible to repurpose existing fields in PowerSchool by renaming the labels to suit your school or district’s unique needs.

Access to localization tools is based on group security permissions and can be accomplished in a batch process or on a page-by-page basis, allowing you flexibility for your localization workflow. You can localize PowerSchool into different permutations based on the system locales you configure. Custom pages can also be localized, using the PowerSchool Administrator web application in conjunction with the localization batch process in PowerSchool.

Student and Parent Access Translations

PowerSchool includes translation of student and parent web access into 18 different languages. This does not translate data coming from PowerSchool, but it does translate all static labels that exist within the PowerSchool Student and Parent portal. The 18 languages (in addition to English) include:

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- French
- German
- Greek
- Haitian Creole
- Hindi
- Italian
- Japanese
- Korean
- Persian
- Polish
- Portuguese

- Russian
- Spanish
- Tagalog
- Vietnamese

If you create a locale in PowerSchool using one of the languages listed, students and parents can select that language from a pop-up menu on the PowerSchool sign in page. The pages display in the selected language. For more information, see *How to Add a Locale*.

Localization Administration

Set up locales, numeric and currency formats, and units of measure from the Localization Administration page accessed via District Office page permissions. Once the system locales are configured, you can set group permissions to allow individual users to localize PowerSchool.

Manage System Locales

A locale is a combination of a language plus geographic information that allows you to identify specific variations on a language. In PowerSchool, the locale is defined by the selected language and country code. When locales are created, they appear on the Manage System Locales page and are available on the user sign in pages of PowerSchool, PowerTeacher Portal, and the Parent and Student Portal (depending on security settings). Selecting a locale displays all translated items in PowerSchool in the specified language for that locale.

Parent and Student portal pages that are already translated into one of the 18 languages provided by PowerSchool display on the Parent and Student portal sign in page on the Select Language pop-up menu.

Note: The language selected on the PowerSchool Student and Parent portal Account Preferences page determines the language in which alerts and emails will be received. If the language is not selected then emails shall be sent in default language selected by the district.

How to Add a Locale

Note: Although the English locale is the initial default for PowerSchool, once a new locale is created, it overwrites the English locale. Therefore, if you require an English locale in addition to any other locales you create, you must add an English locale. You must be signed in at the District level to add or edit a locale.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Manage System Locales**. The Manage System Locales page appears.
4. Click **Add Locale**. The New Locale page appears.
5. Use the following table to enter or select information in the fields:

Field	Description
Locale Display Name	Enter a description for the locale. This is the description that displays in the list of locales on the PowerSchool Sign In page. **Note**: Enter the locale name in the language that pertains to the locale. For example, for a French locale, enter Français, for Spanish enter Español.
Language	Select a supported language from the pop-up menu.
Country	Select a supported country from the pop-up menu. **Note**: The combination of language and country must be unique. Although you may have multiple versions of the same language, you cannot add two of the same language/country combination. For example, you may select English/US and also add English/Canada, but you could not have two versions of English/US in the system.
Date Format	Select a supported date format from the pop-up menu.
Time Format	Select a supported time format from the pop-up menu.
Numeric Format	Select a numeric format from the pop-up menu. To create or modify the available formats, see *Set Numeric/Currency Format*.
Currency Format	Select a currency format from the pop-up menu. To create or modify the available formats, see *Set Numeric/Currency Format*.
System Default Locale	Select the checkbox to identify this locale as the system default. Processes that are not associated with a user logon use the locale marked as the System Default Locale. All nightly jobs also use the System Default Locale. Only one locale can be designated as the System Default Locale.

6. Click **Submit**. The new locale is saved and appears on the Manage System Locales page.

7. To switch to the locale you added, sign out of PowerSchool and then select the locale from the **Select Language** pop-up menu on the sign in page and click **Sign In**.

How to Edit a Locale

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Manage System Locales**. The Manage System Locales page appears.
4. Select a locale. The Edit Locale page appears. Edit the information as needed. For field descriptions, see *How to Add a Locale*.
5. Click **Submit**. A confirmation message appears on the Manage System Locales page.

How to Delete a Locale

If you delete a locale, the associated translations will no longer display in PowerSchool. However, the translations still exist in the PowerSchool database and can be retrieved if the locale is re-created.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Manage System Locales**. The Manage System Locales page appears.
4. Click the **minus (-)** icon next the locale you want to delete. The Cancel and Delete buttons appear.
5. Click **Delete**. A message appears at the top of the page confirming the deletion of the locale.

Configure Locale Independent Settings

Localization settings that are global (not tied to a locale) are set on this page. This includes setting units of measure to be used for health screenings and assigning the alphabetic characters to be used on the Browse Students/Browse Staff search pages.

On the Locale Independent Settings page, you also create and modify numeric and currency format settings that can be selected on the Manage System Locales page. You must be signed in at the District level to set numeric/currency format.

How to Add a Numeric/Currency Format

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Locale Independent Settings**.
4. Click the **Numeric Format** tab, if needed. The Numeric Format page appears.
5. Click **Add Format**. The New Numeric/Currency Format page appears.
6. Use the following table to enter information in the fields:

Field	Description
Display Label	Enter a label or example for this numeric/currency format.
Group Separator	Select the group separator from the pop-up menu.
Decimal Separator	Select the decimal separator from the pop-up menu.

7. Click **Submit**. The format is now available for selection on the Manage System Locales page.

How to Edit a Numeric/Currency Format

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Locale Independent Settings**.
4. Click the **Numeric Format** tab, if needed. The Numeric Format page appears.
5. Select a numeric/currency format. The Edit Numeric/Currency page appears.
6. Edit the information as needed. For field descriptions, see *Set Numeric/Currency Format*.
7. Click **Submit**. A confirmation message appears.

How to Delete a Numeric/Currency Format

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Locale Independent Settings**.
4. Click the **Numeric Format** tab, if needed. The Numeric Format page appears.
5. Click the **minus (-)** icon next the format you want to delete. The Cancel and Delete buttons appear.
6. Click **Delete**. A message appears at the top of the page confirming the deletion of the format.

How to Set Units of Measure

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Locale Independent Settings**.
4. Click the **Miscellaneous** tab. The **Miscellaneous** page appears.
5. Choose the applicable units of measure from the pop-up menu.
6. Click **Submit**.

How to Localize Alphabetic Characters for Browse Students/Browse Staff Search

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Locale Independent Settings**.
4. Click the **Miscellaneous** tab. The **Miscellaneous** page appears.
5. Enter the applicable alphabetic characters in the **Front Page Name Letters** field.
6. Click **Submit**. The alphabetic characters you entered appear on the Search Students and Search Staff pages, in the Browse Students and Browse Staff section.

Enable Language Translator Security Permissions

Enable the Language Translator security setting to allow the users assigned to that group access to the Localize PowerSchool page and individual page localization. For more information, see *Group Security Permissions*. To enable individual page localization, see *Localize Individual Pages*.

How to Enable Language Translator Security Permissions

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.
3. Click a name in the Group Name column. The Edit Group page appears.
4. Select the **Language Translator** checkbox.
5. Click **Submit**. The Groups page appears.

Import and Export Custom Pages

Custom Pages are files created in PowerSchool Administrator that have message keys extracted for translation. These files include custom pages as well as any localized custom page messages. Imported and exported as a .zip file format, these files should not be edited, modified, or unzipped. For more information about translating custom pages, see the PowerSchool Administrator online help or the *Custom Web Page Management User Guide* available on PowerSource.

How to Export Custom Pages

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Page Management, click **Custom Pages Import/Export**. The Custom Pages Import Export page appears.
4. Enter the export file name in the **File Name to Export** field. PS_CustomPagesExport appears by default.
5. Click **Export**. A zip file with all of the custom pages is downloaded.

How to Import Custom Pages

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Page Management, click **Custom Pages Import/Export**. The Custom Pages Import Export page appears.
4. Click **Choose File** (or **Browse**) to select the import file.
5. Click **Import**. The Custom Pages Imported alert appears.

Import Localization Content

Import your translated, localized content into PowerSchool using the Import Localization page.

You can import locale translations (message keys), translation packages, and online help from the Import Localization page, then monitor the import files from the Import Localization Status page.

Translation packages are properties files that the system uses to determine localizations and translations that have been created in PowerSchool. These files include plain text and online help localizations, and in export mode there is an option to include localized customer-defined data. This mode is used to transport files from one PowerSchool installation to another. These files should not be edited, modified, or unzipped.

The import process uploads a zipped file onto a specified server. The uploaded file is installed on the server and made available in PowerSchool. If the server the language pack is uploaded to is part of a server array, the file is distributed to all servers in the array.

How to Import Localization Content

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Import Localization**. The Import Localization page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Source	Click Browse to locate the import file on your computer.
Locale	Select the locale of the translation being imported from the pop-up menu.
Type	Select the file type from the pop-up menu. **Note:** If **Message Key File** is selected, two additional fields appear.
Character Set	Use the pop-up menu to choose the character set for the import file: • **UTF-8 (Unicode)**

	• **Windows ANSI (Windows)** • **Mac Roman (Mac)** • **ISO 8859-1 (Unix)**
Field Delimiter	Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. • **Tab**: Separates fields with a tab • **Comma**: Separated fields with a comma • **Other**: Enter a field delimiter in the blank field, such as a comma **Note:** This field appears if you select **Message Key File** as the **Type** to be imported.
Include column headers:	Deselect the checkbox to exclude the header row from the import. **Note:** This field appears if you select **Message Key File** as the **Type** to be imported.

5. Click **Import**. The Import Localization Results page displays the number of imported records. If a record was not imported, the item, translated text and reason display.

Import Localization Status

When you import localization content, you can check the status of the import on the Import Localization Status page.

How to Monitor Import Localization Status

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Import Localization Status**. The Import Localization Status page appears.
4. Do one of the following:
    - Click **Refresh** to update the page.
    - Click the link in the Status column to view the import results. The Import Localization Results page appears.

- Click the minus icon to delete the completed import.

Note: If the Status column displays **Completed with some failures**, click the link and review the results on the Import Localization Results page. Edit the import file, and then re-import the data.

Export Localization Content

Export your translated, localized content into PowerSchool using the Export Localization page.

How to Export Localization Content

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Export Localization**. The Export Localization page appears.
4. In the Select Export Type section, use the following table to enter or select information in the fields:

Field	**Description**
Type	Select the file type from the pop-up menu.
Locale	Select the locale of the translation being exported from the pop-up menu.
Filename	Enter the desired name for the export file.

5. Click **Next**. The Select Records section appears.
6. In the Select Records section, use the following table to select information:

Field	**Description**
Application and Area	Click an application to view the areas that you can export for that application.

	Select the checkbox next to the area you want to export. Select the **All** checkbox to export all areas for the selected application.
Include	Select the option you want to include in the export from the pop-up menu: • **Translated** • **Not Translated** • **Both**

7. Click **Next**. The Select Options section appears. The total number of records to be exported displays in the Count of Matching Records field.
8. Use the following table to select information:

Field	Description
Character Set	Use the pop-up menu to choose the character set for the import file: • **UTF-8 (Unicode)** • **Windows ANSI (Windows)** • **Mac Roman (Mac)** • **ISO 8859-1 (Unix)**
Field Delimiter	Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. • **Tab**: Separates fields with a tab • **Comma**: Separated fields with a comma • **Other**: Enter a field delimiter in the blank field, such as a comma **Note:** This field appears if you select **Message Key File** as the **Type** to be imported.

First row contains headers:	Select the checkbox to exclude the header row from the import. **Note:** This field appears if you select **Message Key File** as the **Type** to be imported.

9. Click **Export**. The file is exported and downloaded to the specified folder on your computer.

PowerSchool Localization

PowerSchool supports localization of text that appears on the application pages, and information that displays from the database.

On the Localize PowerSchool page, the Text for Translation area displays the default text to be translated, based on the filtering selected. The translation is entered in the Translated Text field.

The functional areas available for translation are based on the District or School sign in. Attendance codes and other specific user defined data are available for translation at the School level. Field names and other text translations are available at the District level.

The Localize PowerSchool page contains three tabs which allows for translation in the following areas of the application:

- Text – Translation of all static text messages and field names.
- Data – Translation of all specific data such as Attendance codes, grade scales, and search expressions.
- Help Text – Translation of online help text for PowerSchool, PowerTeacher Portal, PowerTeacher Substitute Portal, and the PowerSchool Parent and Student Portals.

Individual page translation, which displays the localize page icon on the navigation bar, is enabled on the *Locale Independent Settings* page. Access to the Localize PowerSchool page and individual page translation is controlled by security group permissions.

Localization Rules

When entering translated text, there are certain rules to follow to ensure a more fluent-sounding translation. Review the following rules before you begin the translation process.

HTML

If there are HTML snippets, entities, etc., in the default translation, those must be maintained in the translated text.

For example:
> Change Daily Attendance
would be translated into pig Latin as:
> Angechay Ailyday Attendanceway

Parameter Substitutions

If the default text has constructions of the form {xxx}, you must exactly reproduce them in your translated text. The majority of the time, these will take the form where 'xxx' is a small number (0 or 1).

For example, if you are translating a text like this: *Report {0} of {1} reports(s)* and you are translating to French, the translation should be: *Rapporte {0} de {1} rapporte(s)*

If you omit the {xxx} constructions, the page may not display correctly.

Another example: *{0}Family* would be translated to: *{0}Famille*

The purpose of these constructions is to instruct the software where to substitute information into the middle of a message; each {xxx} represents where one variable or database field is inserted. The software specifies where the substituted data comes from; the message text specifies where the data is substituted in the message body.

Parentheses

Whenever parentheses are used, there must be an open and close set in order to translate correctly.

Space and Empty String Handling

If the translated text string is empty, the translation user interface deletes the translated record from the database. This allows the string to revert to its default value in the user interface. There may be some cases where an actual blank string should be stored, but the system does not currently allow this.

The translation user interface saves translated text with the same beginning/end spacing as the original (default) text.

For example, if the default text is: *key2 = \ records* should be translated to Spanish as: *key2 = \ registros*

Localize Using Batch Mode

Localize static text and messages on the Text tabbed page view on the Localize PowerSchool page. Using the Chose functional area pop-up menu, you can localize text for custom pages, PowerTeacher web access, PowerSchool Parent and Student web access, PowerTeacher Gradebook, and ReportWorks. Localize customer-specific data, such as codes and expressions, on the Data tab.

How to Localize Text or Data in Batch Mode

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Localize PowerSchool**. The Localize PowerSchool page appears.

   Note: This link does not appear if the Language Translator group security permission is not enabled for the user.

4. Depending on the type of batch translation you want to perform, select the **Text** or **Data** tab.
5. Use the following table to enter information in the fields:

Field	**Description**
Choose locale	Choose a locale on which to perform the language translation from the pop-up menu. By default, the current system locale appears.
Choose the functional area, or item you want to translate	Choose the area of the application to translate from the pop-up menu. This filters the selection of information that you can translate in the Text for Translation area. Depending on the tab selected, the pop-up menu displays a list of various types of messages or data grouped by the following areas or applications: • PowerSchool lists all static text or data from the PowerSchool web application. • PowerSchool Customer Defined Data lists all static text that appears on the Data Export Manager page. • PowerTeacher Gradebook lists all static text that appears in the PowerTeacher Gradebook application.

	• ReportWorks lists all static text that appears in the ReportWorks application. The numbers to the right of each section signify how many messages have been translated for the selected locale out of the total number of messages.
Category	Choose the PowerSchool customer defined data category to translate from the pop-up menu. **Note:** This field only appears if **PowerSchool Customer Defined Data** is selected from the **Choose the functional area, or item you want to translate** pop-up menu.
Search for specific text	Enter text in the field. Use the pop-up menu to select a search modifier.
Filtered Retrieved Messages	Choose a filter option from the pop-up menu: • Choose **Display all matching messages** to filter by the information entered in Search for specific text field. • Choose **Display only translated messages** to display only data that has been previously translated. • Choose **Display only non-translated messages** to filter by those messages that have not yet been translated. • Choose **Display only messages needing merge** to filter by only those messages that require a merge between the new and existing text. • Choose **Display only new messages** to filter by new messages only. • Choose **Display only new messages with related localizations** to filter by new messages that have a message key prefix that matches existing localizations.
Retrieve Text	Click to display text for translation based on the selections provided.
Text Key	Displays the internal system identifier, such as the system web page name.

	Note: Custom page text keys are created in PowerSchool Administrator and are identified with the type .htmlc. For more information, see the PowerSchool Administrator online help or the *Custom Web Page Management User Guide* available on PowerSource.
Default Text	Displays the system-defined text. This text displays either in English or the language entered in the default database tables.
Translated Text	Displays the translated text. Click in the field to edit or enter information. **Note**: To copy and add translated text to matching rows, see *Copy and Add Translated Text*.
Translation Hints	Google Translation API is no longer available for translation hints, so clicking on the magnifying glass icon will only return suggestions based on translations already done for the selected language within PowerSchool. Nothing will be displayed if there are no translations currently available.
Copy and Add Translated Text	When localized text or data is added to the Translated Text column, a Copy/Add icon appears to the right of the column. Click on this icon to copy the translated text of that row to the Translated Text field of all the rows in the grid that match that Default Text.
Navigation links	Click the arrows to scroll through the list of text to translate or enter a page number in the field provided to navigate to a specific page of the list. Use the pop-up menu to change the number of lines that display in the list.

6. Click **Submit** to save the Translated Text field entries. A verification message appears.

Localize PowerSchool Online Help

Localize the PowerSchool online help content on the Help Text tabbed page view.

There are several files that contain the text used on the tabs and buttons on the online help pages. You can translate the text on each of these files and it will be reflected on the applicable page in the online help.

Note: If you have customized PowerSchool online help pages, see the PowerSchool Administrator online help or the *Custom Web Page Management User Guide* available on PowerSource for details on extracting text keys for localization.

How to Localize PowerSchool Online Help

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Localize PowerSchool**. The Localize PowerSchool page appears.
4. Select the **Help Text** tab.
5. Use the following table to enter information in the fields:

Field	Description
Choose locale	Choose a locale on which to perform the language translation from the pop-up menu. By default, the current system locale appears.
Choose the functional area, or item you want to translate	Choose the area of the online help to translate from the pop-up menu. This filters the selection of information that you can translate in the Default translation area. Only online help topics, tables of content and indices for the PowerSchool application and portals that display in this list can be translated. The numbers to the right of each section signify how many messages have been translated for the selected locale out of the total number of messages.
File	When an online help category is selected, the associated help files appear in a pop-up menu. Select a file to translate.
Retrieve Text	Click to display the selected content for translation on the Default tab.

Default Tab	Displays the HTML content for the selected help file.
Translated Tab	Displays the translated HTML content.
HTML Editing Toolbar	Displays basic HTML editing functions.

6. Highlight the text you want to convert for translation and click the **Translation Hints** button on the HTML editing toolbar. The Translation Hints dialog appears.
7. Select the applicable text on the Translation Hints. The information appears in place of the text you highlighted. You can also enter the localization text directly in the file.
8. Select the applicable text on the Translation Hints. The information appears in place of the text you highlighted. You can also enter the localization text directly in the file.
9. Use the HTML editing toolbar to make any formatting changes to the help file.
10. Click **Submit** to save. A verification message appears.
11. Click **Help** to view and verify the translation.

How to Localize Help Tabs and Button Text

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Localize PowerSchool**. The Localize PowerSchool page appears.
4. Select the **Help Text** tab.
5. On **the Choose the functional area, or item you want to translate** pop-up menu, choose the following files to edit tab text and/or buttons for the applicable online help page:
    - Contents > toc_header.html: Topic Index, A-Z Index, and Search tabs, and Back button text for the Topic Index page.
    - Contents > toc_search.html: Topic Index, A-Z Index, and Search tabs, and Back button and Search button text for the Search page. Also contains text found on the Search submission and results pages.
    - Index > index_header.html: Topic Index, A-Z Index, and Search tabs, and Back button text for the A-Z Index page.
    - Miscellaneous > header.html: Topic Index, A-Z Index, and Search tabs, and Back button text for the A-Z Index page.

  - Miscellaneous > how_to/pso_how_to_header.html: Topic Index, A-Z Index, and Search tabs, and Back button text for contextual help pages.
6. Click **Submit** to save. A verification message appears.
7. Click **Help** to view and verify the translation.

Enable Individual Page Localization

Set the individual page localization to enable translation of a page in PowerSchool.

How to Enable Individual Page Localization

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Localize PowerSchool**. The Localize PowerSchool page appears.
4. Select the **Settings** tab.
5. Select the **Enable individual page translation in PowerSchool** checkbox.
6. Click **Submit**. Depending on the group security permissions, the localize page icon will appear on the navigation bar in PowerSchool, PowerTeacher portal, and the PowerSchool Student and Parent portal.

Localize Individual Pages

Depending on the assigned user role and page permissions, a localize page button appears in the navigation bar of PowerSchool, PowerTeacher web access, and PowerSchool Parent and Student web access. This button allows you to localize field names and text that appears on that page.

In order to localize individual pages on PowerTeacher and Parent and Student web access, the following settings must be in place:

- Individual page translation must be enabled.
- You must have group security permissions with language translator setting enabled.
- You must have security permissions to access PowerTeacher web access, and/or PowerSchool Parent and Student web access.

How to Localize an Individual Page in PowerSchool

1. Sign in to PowerSchool. The localize page button appears on the navigation bar of each page the user has access to.

2. In the navigation toolbar, click the [Localize Page] icon. The Localize Page pop-up appears.
3. Use the following table to enter information in the fields:

Field	Description
Choose the language to translate or modify	Choose a locale on which to perform the language translation from the pop-up menu. By default, the current system locale appears.
Retrieve Text	Click to display the text for the current page.
Search	Text for translation can be filtered by Text Key, Default Text and Translated Text. Enter the text or a portion of text you want to find.
Text Key	Displays the internal system identifier, such as the system web page name. **Note**: Custom page text keys are created in PowerSchool Administrator and are identified with the type .htmlc. For more information, see the PowerSchool Administrator online help or the *Custom Web Page Management User Guide* available on PowerSource.
Default Text	Displays the system-defined text. This text displays either in English or the language entered in the default database tables.
Translated Text	Displays the translated text. Click in the field to edit or enter information. **Note**: To copy and add translated text to matching rows, see *Copy and Add Translated Text*.
Translation Hints	1. Click the magnifying glass icon to view the Translation Hints dialog. Translated text suggestions appear if an exact match is found between the default text of the current row and the default text of one or more previously translated messages is found.

	2. Select the word and it is automatically placed in the Translated Text column for the selected row. 3. Click the **X** to close the dialog.
Copy and Add Translated Text	When localized text or data is added to the Translated Text column, a Copy/Add icon appears to the right of the column. Click on this icon to copy the translated text of that row to the Translated Text field of all the rows in the grid that match that Default Text.
Navigation links	Click the arrows to scroll through the list of text to translate or enter a page number in the field provided to navigate to a specific page of the list. Use the pop-up menu to change the number of lines that display in the list.

4. Click **Submit** to save the Translated Text field entries. A verification message appears.

How to Localize an Individual Page in the PowerTeacher Portal

In order to translate individual pages in PowerTeacher portal, you must have group security permissions set, and individual page translation must be enabled for the locale.

For more information, see *How to Enable Language Translator Security Permissions* and *How to Enable Individual Page Localization*.

1. On the Address bar, enter the URL for PowerTeacher portal
2. On the sign in page, enter a valid Username and Password.
3. Click **Sign In**. The applicable web access page displays, with the translate page icon available on each page.
4. Follow steps 3 and 4 in *How to Localize an Individual Page in PowerSchool*.

How to Localize an Individual Page in the PowerSchool Student and Parent Portal

In order to translate individual pages in the PowerSchool Student and Parent portal, you must have group security permissions set, and individual page translation must be enabled for the locale.

For more information, see *How to Enable Language Translator Security Permissions* and *How to Enable Individual Page Localization*.

1. On the Address bar, enter the URL for the PowerSchool Student and Parent portal, followed by /?translator=true. For example: **http://[server ID].powerschool.com/public/home.html?translator=true**
2. On the sign in page, enter a valid Username and Password.
3. Click **Sign In**. The applicable web access page displays, with the translate page icon available on each page.
4. Follow steps 3 and 4 in *How to Localize an Individual Page in PowerSchool*.

Localize Custom Pages

Customized PowerSchool pages can be converted to display on the Localize PowerSchool page for batch translation. Use the PowerSchool Administration application to covert the data for translation. For more information on custom pages, the PowerSchool Administrator online help or the *Custom Web Page Management User Guide* available on PowerSource.

Localize Daily Bulletin

You can create different language versions of the bulletin for each locale you have configured in PowerSchool. For more information, see *How to Add a Locale*.

How to Localize a Daily Bulletin Item

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.
3. Do one of the following:
    - Click the date of the existing bulletin item you want to edit. The Edit Daily Bulletin Item page appears.
    - Click **New** to create a new bulletin. The New Daily Bulleting Item page appears. Enter information in the default local fields
4. To copy the original bulletin content and automatically translate it, click the translate icon for the applicable locale.
5. To copy the original bulletin content without translating, click **Copy [default locale]** for the applicable locale. The original bulletin content is copied into the Item Body and the text can be translated manually.
6. Click **Submit**. The Daily Bulletin Setup page displays the translated bulletin item.

How to Verify Localized Daily Bulletin

Note: For more information about daily bulletins, see *Daily Bulletin*.

1. On the start page, choose **Daily Bulletin** under Functions in the main menu. The View Daily Bulletin pop-up window appears.

   Note: If the Default Sign In Page is set to Daily Bulletin, the daily bulletin appears as a page. For more information, see *How to Set the Default Sign In Page*.

2. Do one of the following:
   - Click the **Calendar** icon to select a date to view the bulletin for that day. On the calendar, dates that are shaded blue have a daily bulletin associated to them, the current date displays a black border, and the selected date has no shading. Use the arrow buttons to navigate to a different month.
   - Click the email address to send a message to the person who creates items for the daily bulletin. Send either an announcement to contribute to the bulletin or a message to the bulletin administrator. For more information, contact your PowerSchool administrator.
3. When done viewing, close the View Daily Bulletin pop-up window.

Updates to Localization

When new versions of PowerSchool are released, they may contain changes or updates to messages, field names, and static text within the application. You can view these changes on the Localize PowerSchool page and change the translation if necessary.

How to View and Edit Message Updates

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Localize PowerSchool**. The Localize PowerSchool page appears.
4. Select the **Text** tab.
5. Use the following table to enter information in the fields:

Field	Description
Choose the language to translate or modify	Choose a locale from the pop-up menu. By default, the current system locale appears.

Choose the functional area, or item you want to translate	Choose the functional area of the application to view the updated messages for that area.
Search for specific text	Leave blank.
Filtered Retrieved Messages	Chose a filter option from the pop-up menu: • Choose **Display only messages needing merge** to filter by only those messages that require a merge between the new and existing text. For more information, see *How to Merge Localized Text*. • Choose **Display only new messages** to filter by new messages only. • Choose **Display only new messages with related localizations** to filter by new messages that have a message key prefix that matches existing localizations.

6. Use the tabbed page view to translate the new messages. For more information, see *How to Localize Text or Data in Batch Mode*.

How to Merge Localized Text

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Localization, click **Localize PowerSchool**. The Localize PowerSchool page appears.
4. Select the **Text** tab.
5. On the Filter Retrieved Messages pop-up menu, choose **Display only messages needing merge**. The applicable messages appear in the tabbed view. A merge icon appears in the far right column.
6. Click the merge icon next to the message you want to edit. The **Merge translated text dialog** appears.
7. Use the following table to enter information in the fields:

Field	Description
Text Key	The system-generated message key assigned to the text.
Original Default	The previous version default text before localization.
Current Default	The current version default text.
Update Current Text	Enter the new localization for the current message text.
Default Differences	Displays the changes for the selected message key.

8. Click Use next to the text you want to use for the selected message key. The Merge translated text dialog closes, and the text you selected appears on the Translated Text column of the Localize PowerSchool page.
9. Repeat these steps for each merge.
10. Click **Submit** to save the changes.

Localize PowerTeacher Administrator

PowerTeacher Administrator is a web-based application that allows system administrators to complete and distribute PowerTeacher Gradebook information to a number of teachers, thereby maintaining organization and minimizing teachers' workloads. PowerTeacher Administrator does not currently have batch and page-level localization enabled. Therefore, translations must be handled outside of PowerSchool. However, it is necessary to update a specific file on the PowerSchool server in order for customized translations to appear correctly in PowerTeacher Administrator.

Once the customized translation of the PowerTeacher Administrator content is complete, you will edit a properties file available on the PowerSchool server, change the name as specified in the following procedure, and place it in the specified folder.

How to Update the PowerTeacher Administrator Properties File

1. On the PowerSchool server, navigate to: [drive]:\Program Files\PowerSchool\application\components\powerschool-psweb-[build number]\WEB-INF\classes\com
2. Locate the file **package.properties** within the folder.
3. Copy the file and rename it to the following:

package.[language code].[COUNTRY CODE].properties

Note: Language and country codes are listed in the LOCALE table in the PowerSchool database. The codes are case-sensitive and must be entered in the file name as they appear in the LOCALE table. Be sure the renamed file resides in the correct folder: [drive]:\Program Files\PowerSchool\application\components\powerschool-psweb-[build number]\WEB-INF\classes\com

4. Edit the renamed file using a text-editing tool as needed and translate only the values associated to the message keys (the text to the right of “=”).

Log Entries User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

Log entries are used to create a record regarding a student's behavior, performance, or activity. Many schools use log entries to chronicle disciplinary actions. Log entries can also be used to record students' positive achievements.

Setup

Log Types

Log types are used to group log entries by classification indicating the nature of a log entry. Additionally, subtypes can be created within each log type to further characterize the log entry. For example, a log entry related to cheating on a test is discipline-related. Discipline is the log type, and cheating is the subtype. For more information about log entries and the use of log types, see *Log Entry Fields* and *Log Entries*.

How to Add a Log Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup Page appears.
2. Under Discipline and Log Entries, click **Log Types**. The Log Types page appears.
3. Click **New**. The Edit Log Types page appears.
4. Enter a log type in the **Log Type** field.
5. Click **Submit**. The Log Types page displays the new log type. To add subtypes, see *How to Add a Log Subtype*.

How to Edit a Log Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup Page appears.
2. Under Discipline and Log Entries, click **Log Types**. The Log Types page appears.
3. Click the log type you want to edit. The Edit Log Type page appears.
4. Edit the log type.
5. Click **Submit**. The Log Types page displays the edited log type. To edit subtypes, see *How to Edit a Log Subtype*.

How to Delete a Log Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup Page appears.
2. Under Discipline and Log Entries, click **Log Types**. The Log Types page appears.
3. Click the log type you want to delete. The Edit Log Type page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Log Subtype

1. On the start page, choose **District** under Setup in the main menu. The District Setup Page appears.
2. Under Discipline and Log Entries, click **Log Types**. The Log Types page appears.
3. Click **Edit Subtypes** next to the log type you want to edit. The Edit Subtypes page appears.
4. Click **New**. The Edit Subtype page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Log Code	Enter the code for the log subtype.
Description	Enter a description of the log subtype. This appears in the Subtype pop-up menu when using log entries.

6. Click **Submit**. The Edit Subtypes page appears.

How to Edit a Log Subtype

1. On the start page, choose **District** under Setup in the main menu. The District Setup Page appears.
2. Under Discipline and Log Entries, click **Log Types**. The Log Types page appears.
3. Click **Edit Subtypes** next to the log type you want to edit. The Edit Subtypes page appears.
4. Click either the code or description of the subtype want to edit. The Edit Subtype page appears.
5. Edit the information as needed. For field descriptions, *How to Add a Log Subtype*.
6. Click **Submit**. The Edit Subtypes page displays the edited log subtype.

How to Delete a Log Subtype

1. On the start page, choose **District** under Setup in the main menu. The District Setup Page appears.
2. Under Discipline and Log Entries, click **Log Types**. The Log Types page appears.
3. Click **Edit Subtypes** next to the log type you want to edit. The Edit Subtypes page appears.
4. Click either the code or description of the subtype you want to delete. The Edit Subtype page appears.
5. Click **Delete**.

6. Click **Confirm Delete**. The Selection Deleted page appears.

Log Entry Fields

Log entries are used to create a record regarding a student's behavior, performance, or activity. Many schools use log entries to chronicle disciplinary actions. Log entries can also be used to record students' positive achievements.

The default Log Entries page contains over forty fields, which may or may not be applicable to your district. Based on your needs, you can customize the page to eliminate unneeded fields. Log Entries page customizations are reflected on PowerSchool's Log Entries page.

Using the Log Entry Setup page, you can determine which fields appear and the selections for each field, the format in which the field appears, and the order in which the field appears on the page.

How to Customize the Log Entries Page

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Discipline and Log Entries, click **Log Entry Fields**. The Log Entry Setup page appears.

   The following information displays for each of the 44 configurable log entry fields:

Field	Description
Field Name	Name of all the log entry field as it appears in the database. To edit this information, click the corresponding **Field Name** link.
Field Label	Title of field name, which appears on the Log Entries page.
Description	Description of the field name. This information is for reference only and does not appear on the Log Entries page.
Sort Order	Order in which the field appears on the Log Entries page. You can assign a value of 1 to 44. If you give two or more fields the same value, the fields appear in ascending alphabetical order within the selected sort order. Fields that are not assigned a value appear in ascending alphabetical order at the bottom of this page.

	If you do not want a field to appear on the Log Entries page, choose **Hide**. **Note:** You cannot hide the following fields: Entry_Date, Entry_Time, Entry_Author, LogType, Subtype, Consequence, Subject, and Entry.

3. Click the **Field Name** link of the field you want to customize. The Edit Log Entry Field page appears. The page varies based on the field you selected.
4. Use the following table to edit information in the fields:

Field	**Description**
Field Name	The name of the log entry field appears as it is in the database.
Field Label	Enter the title of the field name, which you want to appear on the Log Entries page. Some HTML formatting is supported. **Note:** You cannot modify the Field Label for the following fields: Entry_Date, Entry_Time, Entry_Author, LogType, Subtype, Consequence, Subject, and Entry.
Input Type	Use the pop-up menu to select the form in which you want the field to appear: • **Entry field** • **Static field** • **checkbox** • **Popup menu** • **Radio buttons** • **Entry box** Not all menu items are available for each Field Name. Only those menu items that are applicable Input Types appear. **Note:** You cannot modify the Input Type for the following fields: Entry_Date, Entry_Time, Entry_Author, LogType, Subtype, Consequence, Subject, and Entry.

Width	If you select the Field Type of "entry field" or "entry box," enter a value to indicate the width of the field/box.
Height	If you select the Field Type of "entry field" or "entry box," enter a value to indicate the height of the field/box.
Data for Popup or Radio buttons	If you select the Input Type of "Popup menu" or "Radio buttons," enter the information you want to appear. A pop-up menu contains values, which consists of two segments. The first segment is the value that is stored in the database. This value is not visible on the Log Entries page. The second segment is the label, which appears within the pop-up menu. The first and second segments use a semi-colon as a delimiter. To set a default value for a pop-up menu, enter a semi-colon as the delimiter and then enter an asterisk at the end of the default entry. The following is an example of a properly formatted data for a pop-up menu where "P;Police" is the default entry: S;Student T;Teacher A;Administrator O;Other School Staff P;Police;* N;Non-School Individual U;Unknown Some fields in the Log table are called "flag fields" because they end with "Flag," such as "Discipline_FelonyFlag" and "Discipline_LikelyInjuryFlag." Flag fields are stored as numeric values. No is stored as a 0 while Yes is stored as 1. The following is an example of properly formatted flag fields: 0;No 1;Yes A radio button follows the same rules as pop-up menu. The only difference is that with a pop-up menu, you can enter numerous sets of values. With a radio button, you are limited to only two sets of values.

5. Once you have entered the appropriate data on the Edit Log Entry Field page, click **Submit**. Upon submitting your customizations, data validation is performed. An error page appears if one or more invalid entries are found due to the following:
    - An empty entry.
    - More than one default value.
    - An entry that has only one segment.
    - An entry that has only one segment where that entry is marked as the default entry.

    The error page lists the line numbers where the error occurred and instructs you to return to the Edit Log Entry Field page to make corrections. The following are example of error messages you may encounter:

    - The entry in line 2 of the popup values is invalid.
    - The entries in these lines of the popup values are invalid: 2 and 4.
    - The entries in these lines of the popup values are invalid: 2, 3, and 4.

    Note: Additionally, the system removes nulls (Char(0)) though no alert page is returned.

6. Once you have made all of your Log Entry Field customizations, click **Submit**.

Log Entry Fields

Field	Description
Entry_Date	The date the log entry is entered, such as 5/17/2009. By default, this field appears as an entry field on the Log Entries student page and is auto-populated with today's date.
Entry_Time	The time the log entry is entered, such as 3:41 PM. By default, this field appears as an entry field on the Log Entries page as is auto-populated with the current time.
Entry_Author	The name of the staff member making the log entry. By default, this field appears as an entry field on the Log Entries page and is auto-populated with the author's username.

LogType	Classification indicating the nature of a log entry. By default, this field appears as a pop-up menu on the Log Entries page. To modify the field selections, see *Log Types*.
Subtype	Further characterization of a log entry associated to a specific LogType. By default, this field appears as a pop-up menu on the Log Entries page. To modify the field selections, see *Log Types*.
Consequence	Action resulting from the log entry. By default, this field appears as a pop-up menu on the Log Entries page.
Subject	The title for the log entry. By default, this field appears as an entry field on the Log Entries page.
Entry	Description for making the log entry. By default, this field appears as an Entry box on the Log Entries page. There is no limit to the length of the entry.
Database Extension (Legacy Custom Field)	Database extension (legacy custom field) created by your district to display a variety of information about students, staff, courses, and sections.

The following fields were incorporated into PowerSchool to address the Federal Gun-Free Schools Act:

Field	**Description**
Discipline_IncidentType	The type of incident. Discipline incident types indicate the nature of an incident. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_IncidentTypeCategory	The category of incident. Discipline incident categories are the general groups of incidents. Add a discipline incident category to further classify group incidents. By default, this field appears as a pop-up menu and an entry field on the Log Entries page.

Discipline_IncidentTypeDetail	The details of the incident. Discipline incident details include specific information about incidents. Use discipline incident details to record additional information about an incident. By default, this field appears as a pop-up menu and an entry field on the Log Entries page.
Discipline_IncidentDate	The date the incident occurred, such as 5/17/2009. By default, this field appears as an entry field on the Log Entries page and is automatically populated with today's date.
Discipline_IncidentContext	Indicates if the incident occurred during or outside school hours and if it occurred at a school-sponsored activity. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_IncidentLocation	Indicates if the incident occurred on campus, during an off-campus school activity, or while using school-sponsored transportation. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_IncidentLocDetail	Discipline location details include specific information about incident locations. By default, this field appears as an entry field on the Log Entries page.
Discipline_Offender	Category of the person committing the incident. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_Reporter	Category of the person reporting the incident. By default, this field appears as a pop-up menu on the Log Entries page.

Discipline_ReporterID	Identification number of the person reporting the incident. By default, this field appears as an entry field on the Log Entries page.
Discipline_VictimType	Category of the person victimized by the incident. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_FelonyFlag	Indicates if the incident was a felony. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_LikelyInjuryFlag	Indicates if the incident likely resulted in an injury. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_SchoolRulesVioFlag	Indicates if the incident was a violation of school rules. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_PoliceInvolvedFlag	Indicates if there were police involved in the incident. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_HearingOfficerFlag	Indicates if there was a hearing officer involved in the incident. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_GangRelatedFlag	Indicates if the incident was gang-related. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_HateCrimeRelatedFlag	Indicates if the incident was a hate crime. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.

Discipline_AlcoholRelatedFlag	Indicates if the incident was alcohol-related. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_DrugRelatedFlag	Indicates if the incident was drug-related. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_DrugTypeDetail	Discipline drug details include specific information about drug-related incidents. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_WeaponRelatedFlag	Indicates if a weapon was used during the incident. By default, this field appears as a Yes or No pop-up menu on the Log Entries page.
Discipline_WeaponType	Indicates the type of weapon. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_WeaponTypeNotes	Notes relating to the weapon type. By default, this field appears as an entry field on the Log Entries page. A maximum of 79 characters can be entered.
Discipline_MoneyLossValue	The amount of money lost in the incident, if the incident results in a dollar loss amount for any party. By default, this field appears as an entry field on the Log Entries page.
Discipline_ActionDate	The date the discipline action was taken, such as 5/17/2009. By default, this field appears as an entry field on the Log Entries page and is auto-populated with today's date.
Discipline_ActionTaken	The disciplinary action taken against a student. By default, this field appears as a pop-up menu on the Log Entries page.

Discipline_ActionTakenDetail	Specific information about disciplinary action taken against a student. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_ActionTakenEndDate	The date the discipline action ends. By default, this field appears as an entry field on the Log Entries page.
Discipline_DurationAssigned	The assigned duration of the discipline action. By default, this field appears as an entry field on the Log Entries page.
Discipline_DurationActual	The actual duration of the discipline action. By default this field appears as an entry field on the Log Entries page.
Discipline_DurationChangeSource	Reasons for any difference in the values of the Discipline_DurationActual from the Discipline_DurationAssigned fields. By default, this field appears as a pop-up menu on the Log Entries page.
Discipline_DurationNotes	Notes relating to the duration of the discipline action. By default, this field appears as an entry field on the Log Entries page. You can enter a maximum of 79 characters.
Discipline_Sequence	The numerical sequence of this log entry if entering more than one log entry for the incident. By default, this field appears as an entry field on the Log Entries page.

Work with Log Entries

Log Entries

Use log entries to create a record regarding a student's behavior, performance, or activity. Many schools use log entries to chronicle disciplinary actions. Log entries can also be used to record students' positive achievements. Regardless of your reason for creating the log entry, the system immediately sends the log entry to the PowerSchool server, where it is stored in the student's permanent record. Only authorized staff members can view, add, edit, and delete log entries and discipline alerts.

Note: The Log Entries student page is customizable. The information presented in this section is based on the default setup and may differ from your PowerSchool Log Entries student page. For information about configuring this page, see *Log Types* and *Log Entry Fields*.

How to View Log Entries

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. If nothing appears, no teachers or other administrators have created log entries for the selected student.

How to Create a Log Entry

Though teachers can create log entries in PowerTeacher Gradebook, administrators create log entries in PowerSchool.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click **New**. The New Log Entry page appears.

   Note: The Date, Time, and Author fields are automatically entered when the page appears. There is no need to change or add anything to those fields unless they are incorrect.

4. Use the following table to enter information in the fields:

Field	Description
Date & Time	Enter the current date and time using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Author	Enter the name of the log entry author.
Log Type	Choose the log type from the pop-up menu.
Subtype	Choose the log subtype from the pop-up menu.
Consequence	Choose the log consequence from the pop-up menu.
Title	Enter a title for the log entry.
Log Entry Text	Enter the log entry text. **Note:** This information goes in the student's permanent record. There is no limit to the length of the entry.

5. Because the Log Entries student page can be customized, the fields that appear on the second half of the page (after the Log Entry Text box) may differ from your PowerSchool Log Entries student page. Use the following table to enter information in the fields:

Field	Description
Incident Type	Choose the type of incident from the pop-up menu.
Incident Type Category	Choose the category of the incident from the pop-up menu.
Incident Type Detail	Choose the details of the incident type from the pop-up menu.

Incident Date	Enter the date of the incident.
Incident Context	Choose the context of the incident from the pop-up menu. Indicate if the incident occurred during or outside school hours and if it occurred at a school-sponsored activity.
Incident Location	Choose the location of the incident from the pop-up menu. Indicate if the incident occurred on campus, during an off-campus school activity, or while using school-sponsored transportation.
Incident Location Detail	Choose the details of the incident location from the pop-up menu.
Offender	Choose the category of the person committing the incident, such as a **student** or **teacher**, from the pop-up menu.
Reporter	Choose the category of the person reporting the incident, such as a **student** or **teacher**, from the pop-up menu.
Reporter ID	Enter the identification number of the person reporting the incident.
Victim Type	Choose the category of the person victimized by the incident, such as a student or teacher, from the pop-up menu.
Felony Flag	Select **Yes** or **No** to indicate if the incident was a felony.
Likely Injury	**Select Yes or No** to indicate if the incident likely resulted in an injury.
School Rules Violation	Select **Yes** or **No** to indicate if the incident was a violation of school rules.
Police Involved	Select **Yes** or **No** to indicate if there were police involved in the incident.

Hearing Officer	Select **Yes** or **No** to indicate if there was a hearing officer involved in the incident.
Gang Related	Select **Yes** or **No** to indicate if the incident was gang-related.
Hate Crime	Select **Yes** or **No** to indicate if the incident was a hate crime.
Alcohol Related	Select **Yes** or **No** to indicate if the incident was alcohol-related.
Drug Related	Select **Yes** or **No** to indicate if the incident was drug-related.
Drug Type	Choose the drug type from the pop-up menu.
Weapon Related	Select **Yes** or **No** to indicate if a weapon was used during the incident.
Weapon Type	Choose the type of weapon, such as a **knife** or a **handgun**, from the pop-up menu.
Weapon Type Notes	Enter any notes related to the weapon type. **Note:** You can enter a maximum of 79 characters.
Money Loss Value	Enter any amount of money lost in the incident.
Action Date	Enter the date the discipline action was taken.
Action Taken	Choose from the pop-up menu the discipline action taken, such as **detention** or **suspension**.
Action Taken Detail	Choose the details of the discipline action taken from the pop-up menu.
Action Taken End Date	Enter the date the discipline action ended.

Duration (Assigned)	Enter the assigned duration of the discipline action, such as **2** for two hours of detention.
Duration (Actual)	Enter the actual duration of the discipline action.
Duration Change Source	Use the pop-up menu to choose the reason for any difference in the values of the Duration (Actual) from the Duration (Assigned) fields.
Duration Notes	Enter any notes related to the duration of the discipline action. **Note:** You can enter a maximum of 79 characters.
Sequence	Enter the numerical sequence of this log entry if entering more than one log entry for the incident.
Administrator ID	Enter the identification number of the person administering the discipline action.

6. Click **Submit**. The Changes Recorded page appears.

How to Edit a Log Entry

There are times when you must change an entry because it contains too much or not enough information. Only those school administrators with the proper permissions can edit a log entry.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click the date of the entry you want to edit. The Edit Log Entry page appears.
4. Use the following table to edit information in the fields:

Field	**Description**
Date & Time	Enter the current date and time using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you

	submit the date with an incorrect format, the date field is submitted as a blank entry.
Author	The name of the log entry author appears.
Log Type	Choose the log type from the pop-up menu.
Subtype	Choose the log subtype from the pop-up menu.
Consequence	Choose the log consequence from the pop-up menu.
Title	Enter a title for the log entry.
Log Entry Text	Enter the log entry text. **Note:** This information goes in the student's permanent record. There is no limit to the length of the entry.

See *How to Create a Log Entry* for details of the Federal Gun Safe Schools Act Information fields.

Note: Depending on your state, additional state-specific fields may appear. Modify the fields as necessary.

5. Click **Submit**. The Changes Recorded page appears.

How to Delete a Log Entry

Occasionally a log entry must be deleted from the student's permanent record. Only those school administrators with the proper permissions can delete a log entry.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click the date of the entry you want to delete. The Edit Log Entry page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Discipline Alert

Use a Discipline alert to indicate and make staff members aware of a student's discipline information.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click **Edit Discipline Alert**. The Discipline Alert page appears.
4. Use the following table to enter information in the fields:

Field	Description
Discipline Alert Text	Enter the discipline-related information.
Alert Expires	Enter the alert expiration date, if any, using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If there is no expiration date, use the default entry 0/0/0.

5. Click **Submit**. The Discipline Alert icon appears at the top of each page for the selected student. If the student does not have a Discipline alert, the icon does not appear.
6. Click the Discipline Alert icon to read the alert from any page. The Discipline alert for the selected student appears.
7. Click **Close** to close the Discipline Alert window.

Search Log Entries

Log entries are used to create a record regarding a student's behavior, performance, or activity. Many schools use log entries to chronicle disciplinary actions. Log entries can also be used to record students' positive achievements.

Using the Search Log Entries page, you can search for log entries based on selected parameters. Upon submitting the search, the Log Entry Functions page appears displaying three output options. You can view a list of the log entries, print a log entries report, or export the log entries.

How to Search for a Log Entry

Use PowerSchool to search for log entries containing selected words or those created during a specific period. Your security access will dictate how detailed of a search you can perform. For more information, see *Security*.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Search Log Entries**. The Log Entries Search page appears.
3. Complete any combination of the following fields. Use the following table to enter information in the fields:

Field	**Description**
Log Type	Choose the log type from the pop-up menu.
Log Subtype	Choose the log subtype from the pop-up menu.
Log Consequence	Choose the log consequence from the pop-up menu.
Contain this text	Enter the log entry text to search for.
And contain this text	Enter additional log entry text to search for.
Does not contain this text	Enter log entry text to be ignored during the search.
Title contains this text	Enter all or part of the title of the log entry.
Entered on or after this date	Enter a date either before or on the date the log entry was created using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Entered on or before this date	Enter a date either after or on the date the log entry was created using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

Student Grade Level	Enter the grade level of the student.
Author	Enter the name of the log entry author.
Sort by	Choose the sort order criteria from the pop-up menu.

4. Click **Submit**. The Log Entry Functions page appears.
5. Depending on what you want to do with the Log records you have selected, select one of the following:
    - *List Log Entries*
    - *Report on Log Entries*
    - *Quick Export*
6. Based on your selection, see the appropriate section below.

List Log Entries

Use this option to create a line listing of the log entries in the current selection of log entries.

How to List Log Entries

1. Search for log entries. For more information, see *How to Search for a Log Entry*.
2. On the Log Entry Functions page, click **List Log Entries**. The List Log Entries page appears. The system tells you how many log entries were found and lists each entry.
3. Do one of the following:
    - Click **Make this the current selection of students** to work with the entire group.
    - Click a student name to view all log entries for that student.

Report on Log Entries

Use this option to print log object reports that you have created using the Objects reporting tool. For more information, see *Objects Reports*.

Note: Only one log record can be printed per page.

How to Report on Log Entries

1. Search for log entries. For more information, see *How to Search for a Log Entry*.

2. On the Log Entry Functions page, click **Print a Report**. The Print a Report. page appears.
3. Use the following table to enter information in the fields:

Field	Description
Which report would you like to print?	Choose the report you want to print from the pop-up menu.
Which Log Entries?	Indicate the number of report pages you want to print by selecting one of the following: • Leave the **Only the first** option blank to print all of the report pages. • Select the **Only the first** option to limit the number of report pages you want to print. Enter the number of pages in the pages field.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. **Note:** When generating object reports, certain report text may appear in the default English language. For more information, see *Object Reports*.

4. Click **Submit** to generate the report. The Report Queue page appears. For more information, see *Report Queue*.

Export Log Entries

Use this option to quickly produce a list of information from the Log table.

How to Export Log Entries

1. Search for log entries. For more information, see *How to Search for a Log Entry*.
2. On the Log Entry Functions page, click **Quick Export**. In most cases, you will not need to change the default options on the Export Students page. Skip to Step 4. To change the selections, proceed to the next step.
3. Use the following table to enter information in the fields:

Field	Description
[Fields to be Exported]	Enter the fields to be included on the exported spreadsheet. Enter as many fields as you want. Separate multiple fields with spaces. To insert a PowerSchool field into this field: 1. Click **Fields** at the bottom of the page to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears. The following are Log table student fields you can export: • [01]LastFirst • [01]Grade_Level

	• [01]Student_Number • [01]DOB • [01]SSN • [01]Ethnicity • [01]Mailing_City • [01]Mailing_Street • [01]Mailing_State • [01]Mailing_Zip • [01]Alert_Discipline • [01]State_StudentNumber The following are Log table discipline fields you can export: • Entry_Author • Entry_Date • Entry_Time • Student_Number • Subject • Entry • Consequence • Subtype • Category • Logtypeid • Discipline_IncidentType • Discipline_IncidentTypeDetail • Discipline_IncidentTypeCategory • Discipline_IncidentContext • Discipline_IncidentDate • Discipline_IncidentLocation • Discipline_ActionDate • Discipline_IncidentLocDetail • Discipline_ActionTaken • Discipline_ActionTakenDetail • Discipline_AdministratorID • Discipline_LikelyInjuryFlag • Discipline_AlcoholRelatedFlag • Discipline_MoneyLossValue • Discipline_DrugRelatedFlag • Discipline_Offender • Discipline_DrugTypeDetail • Discipline_PoliceInvolvedFlag

	• Discipline_DurationActual • Discipline_Reporter • Discipline_DurationAssigned • Discipline_ReporterID • Discipline_DurationChangeSource • Discipline_SchoolRulesVioFlag • Discipline_DurationNotes • Discipline_Sequence • Discipline_FelonyFlag • Discipline_VictimType • Discipline_GangRelatedFlag • Discipline_WeaponRelatedFlag • Discipline_HateCrimeFlag • Discipline_WeaponType • Discipline_HearingOfficerFlag • Discipline_WeaponTypeNotes • Discipline_ActionTakenEndDate • Custom
Field Delimiter	Choose a field delimiter from the pop-up menu. The field delimiter is the item that separates fields in the exported data. If you choose **Other**, enter the delimiter in the blank field.
Record Delimiter	Choose the record delimiter from the pop-up menu. This refers to the item that will separate the records in the exported data. If you choose Other, enter the delimiter in the field. • **CR**: Carriage return • **CRLF**: Carriage return line feed • **LF**: Line feed
Surround Fields	Select the checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select the checkbox to include column titles on the first row of the exported data.

4. Click **Submit**. The exported data appears.

5. Choose **File** > **Save As...** to save the file. Open the saved file using a spreadsheet application, such as Excel or Lotus 1-2-3. Format, print, and save it as any other spreadsheet document.

Mobile Web Pages User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool offers two different types of mobile access: Mobile web pages, and mobile apps. Each requires separate configuration settings within PowerSchool.

Mobile Apps

Mobile apps include:

- PowerTeacher Mobile (iPad)
- PowerSchool for Parents (iPod Touch, iPhone, iPad, and Android)
- PowerSchool for Students (iPod Touch, iPhone, iPad, and Android)

PowerSchool for Parents and PowerSchool for Students mobile apps are available for download from the iTunes App Store and Google Play.

PowerTeacher Mobile is available for download from the iTunes App Store.

Mobile Web Pages

Mobile web pages are a way for teachers and administrators to access the mobile pages of PowerSchool using the iPhone® or Android operating system mobile devices. Since these are web pages, it is not necessary to install any application on your mobile device. Simply navigating to the normal PowerSchool sign in through the device's browser will allow PowerSchool to detect that a mobile device is being used and present pages that are tailored to the smaller screens. Mobile web pages include rich functionality such as the ability to view comprehensive student information including grades and schedules, as well as viewing and recording attendance.

Mobile Apps Setup

Before your district begins using mobile apps, it is recommended that you set up the following:

- Register your PowerSchool server with PowerSource.
- Upload a School Map (optional).

How to Register Your PowerSchool Server with PowerSource

Registering your PowerSchool server with PowerSource enables end-users to easily configure the mobile app to work with your PowerSchool server.

Enter the information needed for registering your PowerSchool server with PowerSource.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Mobile Registration**. The Mobile Registration page appears.
3. Use the following table to enter information in the PowerSource Registration of District's Mobile App Services fields:

Field	Description
Mobile District Code	Displays a four-digit code if the PowerSchool server is registered with the PowerSource mobile registration server. If the PowerSchool server has not been registered, dashes appear.
Mobile App Server Address	Enter the server or IP address remote web traffic will use for the mobile web services. This can be an individual IP, domain, or a load-balancer address. **Note:** Typically this is the same as your Tomcat server.
Mobile App Port Number	Enter the port number remote web traffic will use for the mobile web services. **Note:** Typically this is the same as your Tomcat server.

Mobile App SSL Enabled	If your Tomcat server or Load Balancer is using SSL, select the checkbox. Otherwise leave the checkbox blank. **Note:** This option does not enable or disable SSL, it only informs the PowerSource Registration that your servers are using SSL.
District Postal Code	Enter the district's postal code. This is used when teachers search for your district via zip or geo-location.

4. Click **Submit**. The Changes Recorded page appears.

School Map

You can upload a map of your campus that is visible to students using the PowerSchool Mobile. For best results, use a PDF with text for room numbers and names. This allows students and parents to search for a room number.

Note: Maximum file size for uploaded map image is 1 MB.

How to Upload a School Map

Upload a school map in PDF, JPEG, GIF or PNG format. See the upload page for detailed information on recommended specifications.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **School Map**. The School Map page appears.
3. Click **Choose File** (or **Browse**) to select the school map file.
4. Click **Submit**. The School Map page appears. The uploaded map file appears as a download link.

How to Delete a School Map

Once the school map has been uploaded, you may need to remove it in the future.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **School Map**. The School Map page appears.
3. Click **Delete School Map**. The School Map page appears, and the school map link is removed.

Mobile Web Pages Setup

Before your district can begin using mobile web pages, you must set up the following items:

- Enable mobile web pages at the district level.
- Set mobile web page settings at the school level.

Once mobile web pages is enabled at the district level and mobile web pages settings are set at the school level, all staff members will have access to the mobile pages of PowerSchool using a mobile device.

Enable Mobile Web Pages at the District Level

To get started, you must enable mobile web pages at the district level.

How to Enable Mobile Web Pages

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Miscellaneous**. The Miscellaneous page appears.
3. Select the **Enable Mobile Web Pages** checkbox to enable access to the mobile version of PowerSchool. For field descriptions, see *Miscellaneous District Settings*.

   Note: Alternatively, deselect the checkbox to disable access to the mobile version of PowerSchool.

4. Click **Submit**. The Changes Recorded page appears.

Set Mobile Browser Settings

Once mobile web pages are enabled at the district level, you can then set mobile browser settings at the school level.

How to Set Mobile Browser Settings

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Mobile Browser Settings**. The Mobile Browser Settings page appears.
3. Use the following table to enter information in the fields:

Field	Description
Disable Mobile PS (Admin)	If you want administrators in this school to be able to access the mobile pages of PowerSchool in mobile browsers, leave the **Optimized Pages** checkbox blank. Alternatively, if you do not want Administrators in this school to be able to access the mobile version of PowerSchool pages, select the **Optimized Pages** checkbox. By default, this feature is enabled.
Disable Mobile PS (Teachers)	If you want teachers in this school to be able to access the mobile pages of PowerTeacher in mobile browsers, leave the **Optimized Pages** checkbox blank. Alternatively, if you do not want teachers in this school to be able to access the mobile version of PowerTeacher pages, select the **Optimized Pages** checkbox.
Disable Mobile PS (Subs)	If you want subs in this school to be able to access the mobile pages of PowerTeacher Substitute in mobile browsers, leave the **Optimized Pages** checkbox blank. Alternatively, if you do not want subs in this school to be able to access the mobile version of PowerTeacher Substitute pages, select the **Optimized Pages** checkbox. By default, this feature is enabled.
Default Class Sort	Indicate the order by which you want classes to appear when accessing PowerSchool, PowerTeacher, and PowerTeacher Substitute using a mobile browser by choosing one of the following from the pop-up menu: • **Course/Expression** to sort by course name and then schedule expression. • **Expression/Course** to sort by schedule expression and then course name.
Hide Bus Route	If you do not want bus routes to appear when accessing PowerSchool, PowerTeacher, or PowerTeacher Substitute using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank.

Show Bus Info From Transportation or Student Fields	If you have opted not to hide bus route information, indicate which bus route information you would like to appear by choosing **Transportation** or **Student Fields** from the pop-up menu. If you chose **Transportation**, bus route information is pulled from the Transportation table. If you chose, **Student Fields**, bus route information is pulled from the Students table. For more information, see the *PowerSchool Data Dictionary Tables* available on PowerSource. Otherwise, select the checkbox.
Hide Student Photos	If you have opted not to hide bus route information, indicate which bus route information you would like to appear by choosing Transportation or Student Fields from the pop-up menu. If you chose Transportation, bus route information is pulled from the Transportation table. If you chose, Student Fields, bus route information is pulled from the Students table. For more information, see the PowerSchool Data Dictionary Tables available on PowerSource. Otherwise, select the checkbox.
Hide Lunch Count (Subs)	If you do not want student photos to appear when accessing PowerSchool, PowerTeacher, or PowerTeacher Substitute using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank. If you do not want lunch counts to appear when accessing PowerTeacher Substitute using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank.
Hide Lunch Count (Teachers)	If you do not want lunch counts to appear when accessing PowerTeacher using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank.

4. Click **Submit** to save the preferences.

PowerSchool Mobile Web Pages

PowerSchool mobile web pages are designed for administrators to quickly and easily access the mobile pages of PowerSchool using a mobile device.

Note: All pages are formatted to fix a 320-pixel width, the standard size for mobile devices.

Get Started with PowerSchool Mobile Web Pages

Sign In to PowerSchool Mobile Web Pages

Because PowerSchool is a secure system, you need a secure connection to use it. To access PowerSchool, you must first sign in to the system.

Note: Do not use someone else's password or give your password to anyone else.

How to Sign In to PowerSchool Mobile Web Pages

1. On you mobile device, open your Web browser to your school's PowerSchool URL. The Administrator Sign In page appears.
2. Enter your username in the first field.
3. Enter your password in the second field.

   Note: The characters appear as asterisks (*) to ensure greater security when you sign in.

4. Click **Enter**. The start page appears, and you are signed in to PowerSchool. For more information, see *PowerSchool Mobile Web Pages Home Page*.

   Note: Alternately, you can press **ENTER** or **RETURN** on your keyboard.

PowerSchool Mobile Web Pages Home Page

When you sign in to PowerSchool mobile web pages, the Home page appears. This page serves as the central point from which you begin your PowerSchool mobile web pages session. The PowerSchool mobile web pages Home page consists of the following main areas:

- Navigation bar
- ID bar
- Schedule
- Menu

Navigation Bar

The navigation bar appears at the top of the PowerSchool mobile web pages Home page and is common to every page in the application. The navigation bar includes the following information:

Field	Description
Home	Click to return to the Home page.
[Page]	The page name you are currently viewing appears.
Sign Out	Click to sign out of PowerSchool mobile web pages. For more information, see *Sign Out of PowerSchool Mobile Web Pages*.

ID Bar

The ID bar appears just below the navigation bar and displays your name. In an effort to ensure that your account is secure, and your information protected, the date of the last time you signed in to appears next to your name. This information can be used to alert you to any unusual account activity. If you experience any unusual account activity, report it to your school.

School

The name of your default school (or district) appears. If you have access to more than one school, you can click the link to access the Change Schools page where you can select another school. Not everyone has permission to switch schools. Switching schools cancels any selection of students made in the previous school. Before beginning any PowerSchool procedure, be sure the school (or district) in which you want to work appears.

How to Change Schools

1. Click **School**. The Change Schools page appears
2. Choose the appropriate school name or choose **District Office** from the **School** pop-up menu. The navigation bar displays the name of the school you just selected.

   Note: If the page does not refresh automatically, click **Submit**.

Schedule

The name of the current day's schedule appears. Click to view the Bell Schedule page, which provides detailed information, including the periods, start times, stop times and duration of each period.

Menu

The main menu includes links to the following functions:

Field	**Description**
Students	Click to browse for students. For more information, see *Students*.
Teachers	Click to search for teachers. For more information, see *Teachers*.
Attendance	Click to view attendance. For more information, see *Attendance*.
Activities	Click to search for students by activity. For more information, see *Activities*.
Birthdays	Click to view students' birthdays. For more information, see *Birthdays*.
Daily Bulletin	Click to read your school's daily bulletin. For more information, see *Daily Bulletin*.
Exit to Main PS	Click to return to PowerSchool in "normal" mode.

Work with the PowerSchool Mobile Web Pages Menu

Note: Access to information is based on your page-level permissions. For more information, see *Security Permissions*. Additionally, if certain information does not appear, that information may be set to "hidden" by your school's PowerSchool administrator.

Students

How to Search for a Student By Last Name

1. On the Home page, click **Students**. The Students page appears.

2. Click a letter of the alphabet to display a list of students whose last names begin with the selected letter. The Last: [Letter] page appears.
3. Click the name of the individual whose record you want to work with. The student page appears. For more information, see *How to Work with Student Information*.

How to Search for a Student By Grade Level

1. On the Home page, click **Students**. The Students page appears.
2. Click the grade level for which you want to view students. The Grade: [Number] page appears.
3. Click the name of the individual whose record you want to work with. The student page appears. For more information, see *How to Work with Student Information*.

How to Search for an All Students

1. On the Home page, click **Students**. The Students page appears.
2. Click **All**. The All Students page appears.
3. Click the name of the individual whose record you want to work with. The student page appears. For more information, see *How to Work with Student Information*.

How to Work with Student Information

1. To work with student information, search for a student by activity, birthday, grade level, last name, or teacher. For more information, see respective *How To*.
2. Click the name of the individual whose record you want to work with. The student page appears. The following student information displays:

Field	Description
Prev	Click to view the previous student in the current student selection.
Next	Click to view the next student in the current student selection.
[Student Information]	Displays the student's photo, name, student number, grade level, date of birth, and age.
Find Me	Click to find the student based on the current time, the current day's bell schedule, and the student's schedule. The Find Me page displays the following information:

	• Period • Rotation • Current Time • First Class Begins At • Last Class End At
Schedule	Click to view the student's current schedule. The Schedule page displays the following information for each of the student's classes: • Period • Course • Term Course Grade/Percent • Absences • Tardies • Teacher • Room
Bus	If information is being pulled from the Transportation table, the student's bus number(s) displays. Click to view additional details, including Route, Description, Dates, and Departure. If information is being pulled from the Student Fields table, the student's bus route(s) displays. Click to view additional details, including bus stop(s).
Locker	Displays the student's locker number. Click to view the student's locker number and locker combination.
Activities	Displays the number of activities the student is involved in. Click to view a list of the activities.
Demographics	Displays student's guardian, home phone number, and address. Click the home phone number of a guardian to call that guardian. Click the address to view a map of the address location.
Family	Displays the names and grades of students who are related to this student. Click to view a related student's student record. Click

	Select Entire Family to view a list of the related students, which will make them the current selection. The Family page appears.
Parents	Displays the email address, name, phone numbers, and employer of parents or guardian associated to the student. Click the email address of a parent or guardian to email that parent or guardian. Click the phone number of a parent or guardian to call that parent or guardian.
Emergency Contacts	Displays the relationship, name, and phone numbers of emergency contacts associated to the student. Click the phone number of an emergency contact to call that emergency contact.

Teachers

How to View a Teacher's Current Schedule

1. On the Home page, click **Teachers**. The Teachers page appears.
2. Click the name of the teacher whose schedule you want to view. The Schedule page appears displaying the selected teacher's schedule.

How to View a Teacher's Class Roster

1. On the Home page, click **Teachers**. The Teachers page appears.
2. Click the name of the teacher whose roster you want to view. The Schedule page appears displaying the selected teacher's schedule.
3. Click the class for which you want to view the roster. The Roster page appears.

How to Search for Students by Teacher

1. On the Home page, click **Teachers**. The Teachers page appears.
2. Click the name of the teacher whose schedule you want to view. The Schedule page appears.
3. Click the class for which you want to view the roster. The Roster page appears. A photo roster of all students in the class display.
4. Click the name of a student to view the student's record. The student page appears. For more information, see *How to Work with Student Information*.

Attendance

How to View the Current Day's Attendance

1. On the Home page, click **Attendance**. The Attendance page appears.
2. Do one of the following:
   - Click **Daily**. The Daily Attendance page appears.
   - Click **Meeting**. The Meeting Attendance page appears.
3. Click the period for which you want to view attendance. The Attendance page appears.

Activities

How to Search for Students by Activity

1. On the Home page, click **Activities**. The Activities page appears. A list of all activities with membership totals display.
2. Click the name of the activity you want to search by. The [Activity Name] page appears. A photo roster of all students involved in the selected activity display.
3. Click the name of a student to view the student's record. The student page appears. For more information, see *How to Work with Student Information*.

Birthdays

How to View Birthdays

1. On the Home page, click **Birthdays**. The Birthdays page appears. A photo roster of all students with birthdays yesterday, today, or tomorrow display.
2. Click the name of student to view the student's record. For more information, *How to Work with Student Information*.

Daily Bulletin

How to View the Daily Bulletin

1. On the Home page, click **Daily Bulletin**. The Daily Bulletin page displays today's announcements and links to previous or future bulletins.
2. Click the zoom icons increase or decrease the font size for better readability.
3. Click the date links at the top or bottom of the page to view that day's bulletin.
4. Click the e-mail address at the bottom of the page to send a message to the person who issues the announcements. Depending on your default e-mail application, an e-mail form appears.
5. Complete the e-mail message.

6. Click **Send**.

Quit PowerSchool Mobile Web Pages

Sign Out of PowerSchool Mobile Web Pages

When finished working in PowerSchool mobile web pages, it is important to sign out of the application.

How to Sign Out of PowerSchool Mobile Web Pages

1. Return to the Home page.
2. Click **Sign Out** in the navigation bar. The Administrator Sign In page appears. You must enter your username and password again to redisplay the PowerSchool mobile web pages Home page.

PowerTeacher Mobile Web Pages

PowerTeacher mobile web pages are designed for teachers to quickly and easily access the mobile pages of PowerTeacher using a mobile device.

Note: All pages are formatted to fix a 320-pixel width, the standard size for mobile devices.

Get Started with PowerTeacher Mobile Web Pages

Sign In to PowerTeacher Mobile Web Pages

Before you can sign in to PowerTeacher mobile web pages, you will need your school's PowerTeacher URL, your username, and your password. If you do not have this information or have questions, contact your school's PowerSchool administrator.

Note: Do not use someone else's password or give your password to anyone else.

How to Sign In to PowerTeacher Mobile Web Pages

1. On you mobile device, open your Web browser to your school's PowerTeacher URL. The Teacher Sign In page appears.
2. Enter your username in the first field.
3. Enter your password in the second field.

   Note: The characters appear as asterisks (*) to ensure greater security when you sign in.

4. Click **Enter**. The PowerTeacher mobile web pages Home page appears. For more information, see *PowerTeacher Mobile Web Pages Home Page*.

   Note: Alternately, you can press **ENTER** or **RETURN** on your keyboard.

PowerTeacher Mobile Web Pages Home Page

When you sign in to PowerTeacher mobile web pages, the Home page appears. This page serves as the central point from which you begin your PowerTeacher mobile web pages session. The PowerTeacher mobile web pages Home page consists of the following main areas:

- Navigation bar
- ID bar
- Schedule

- Menu

Navigation Bar

The navigation bar appears at the top of the PowerTeacher mobile web pages Home page and is common to every page in the application. The navigation bar includes the following information:

Field	Description
Home	Click to return to the Home page.
[Page]	The page name you are currently viewing appears.
Sign Out	Click to sign out of PowerTeacher mobile web pages . For more information, see *Sign Out of PowerTeacher Mobile Web Pages*.

ID Bar

The ID bar appears just below the navigation bar and displays your name. In an effort to ensure that your account is secure, and your information protected, the date of the last time you signed in to appears next to your name. This information can be used to alert you to any unusual account activity. If you experience any unusual account activity, report it to your school.

Schedule

The name of the current day's schedule appears. Click to view the Bell Schedule page, which provides detailed information, including the periods, start times, stop times and duration of each period.

Menu

The main menu includes links to the following functions:

Field	Description

Attendance	Click to record meeting attendance. For more information, see *Attendance*.
Rosters	Click to view or work with classes. For more information, see *Rosters*.
Birthdays	Click to view students' birthdays. For more information, see *Birthdays*.
Daily Bulletin	Click to read your school's daily bulletin. For more information, see *Daily Bulletin*.
Lunch Counts	Click to submit lunch counts. For more information, see *Lunch Counts*.
Exit to Main PS	Click to return to PowerTeacher in "normal" mode.

Work with the PowerTeacher Mobile Web Pages Menu

Note: Access to information is based on your page-level permissions. For more information, see *Security Permissions*. Additionally, if certain information does not appear, that information may be set to "hidden" by your school's PowerSchool administrator.

Attendance

How to Record Meeting Attendance

1. On the Home page, click **Attendance**. The Attendance page appears.

   Note: A dot appears next to each class' **Chair** icon. The color of the dot indicates whether or not you've taken attendance for that class. A clear dot indicates attendance has not been taken. A yellow dot and fraction indicates partial attendance has been taken. A green dot indicates attendance has been taken.

2. Click the period for which you want to record attendance. The Record Meeting Attendance page appears.
3. Click **Att Code**. The Att Code page appears.

4. Select the attendance code you want to assign. The Record Meeting Attendance page appears.
5. Click **Submit**. The Home page appears.

Rosters

How to View Student Information

1. On the Home page, click **Rosters**. The Schedule page appears.
2. Click the class for which you want to work. The Roster page appears displaying a list of students for the selected class.
3. Click the name of the student whose record you want to view. The following student information displays:

Field	**Description**
[Student Information]	Displays the student's photo, name, student number, grade level, date of birth, and age.
Find Me	Click to find the student based on the current time, the current day's bell schedule, and the student's schedule. The Find Me page displays the following information: • Period • Rotation • Current Time • First Class Begins At • Last Class End At
Schedule	Click to view the student's current schedule. The Schedule page displays the following information for each of the student's classes: • Period • Course • Term Course Grade/Percent • Absences • Tardies • Teacher

	• Room
Demographics	Displays student's guardian, home phone number, and address. Click the home phone number of a guardian to call that guardian. Click the address to view a map of the address location.
Family	Displays the names and grades of students who are related to this student. Click to view a related student's student record. Click **Select Entire Family** to view a list of the related students, which will make them the current selection. The Family page appears.
Parents	Displays the email address, name, phone numbers, and employer of parents or guardian associated to the student. Click the email address of a parent or guardian to email that parent or guardian. Click the phone number of a parent or guardian to call that parent or guardian.
Emergency Contacts	Displays the relationship, name, and phone numbers of emergency contacts associated to the student. Click the phone number of an emergency contact to call that emergency contact.

Birthdays

How to View Birthdays

1. On the Home page, click **Birthdays**. The Birthdays page appears. A photo roster of all students with birthdays yesterday, today, or tomorrow display.
2. Click the name of student to view the student's record. For more information, see the field description table in the *Rosters* section.

Daily Bulletin

How to View the Daily Bulletin

1. On the Home page, click **Daily Bulletin**. The Daily Bulletin page displays today's announcements and links to previous or future bulletins.
2. Click the zoom icons increase or decrease the font size for better readability.
3. Click the date links at the top or bottom of the page to view that day's bulletin.

4. Click the e-mail address at the bottom of the page to send a message to the person who issues the announcements. Depending on your default e-mail application, an e-mail form appears.
5. Complete the e-mail message.
6. Click **Send**.

Lunch Counts

How to Submit Lunch Counts

1. On the Home page, click **Lunch Counts**. The Lunch Counts page appears.
2. Click the class for which you want to submit lunch counts. The Submit Lunch Counts page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Student Breakfast	Enter the number of student breakfasts.
Adult Breakfast	Enter the number of adult breakfasts.
Adult Lunch	Enter the number of adult lunches.
Student Lunch	Enter the number of student lunches.
Student A La Carte	Enter the number of student à la carte meals.
Adults A La Carte	Enter the number of adult à la carte meals.
Milk	Enter the total number of students and adults buying milk.
Other 1	Enter the number of Other 1 meals (optional). **Note:** The field represents an additional meal type that may be used for special request meals, such as a vegetarian dish or a kosher dish.

Other 2	Enter the number of Other 2 meals (optional). **Note:** See *Other 1*.

4. Click **Submit** to enter the counts. The Home page appears.

Quit PowerTeacher Mobile Web Pages

Sign Out of PowerTeacher Mobile Web Pages

When finished working in PowerTeacher mobile web pages, it is important to sign out of the application.

How to Sign Out of PowerTeacher Mobile Web Pages

1. Return to the Home page.
2. Click **Sign Out** in the navigation bar. The Teacher Sign In page appears. You must enter your username and password again to redisplay the PowerTeacher mobile web pages Home page

PowerTeacher Substitute Mobile Web Pages

PowerTeacher Substitute mobile web pages are designed for substitute teachers to quickly and easily access the mobile pages of PowerTeacher Substitute using a mobile device.

Note: All pages are formatted to fix a 320-pixel width, the standard size for mobile devices.

Get Started with PowerTeacher Substitute Mobile Web Pages

PowerTeacher Substitute mobile web pages are designed for substitute teachers to quickly and easily access the mobile pages of PowerTeacher Substitute using a mobile device.

Note: All pages are formatted to fix a 320-pixel width, the standard size for mobile devices.

Sign In to PowerTeacher Substitute Mobile Web Pages

Before you can sign in to PowerTeacher Substitute mobile web pages, you will need your school's PowerTeacher Substitute URL, your username, and your password. If you do not have this information or have questions, contact your school's PowerSchool administrator.

Note: Do not use someone else's password or give your password to anyone else.

How to Sign In to PowerTeacher Substitute Mobile Web Pages

1. On you mobile device, open your Web browser to your school's PowerTeacher Substitute URL. The Substitute Teacher Sign In page appears.
2. Choose the school from the **School** pop-up menu.
3. Choose the teacher from the **Teacher** pop-up menu.
4. Enter the assigned password in the **Password** field.
5. Click **Enter**. The PowerTeacher Substitute mobile web pages Home page appears. For more information, see *PowerTeacher Substitute Mobile Web Pages Home Page*.

   Note: Alternately, you can press **ENTER** or **RETURN** on your keyboard.

PowerTeacher Substitute Mobile Web Pages Home Page

When you sign in to PowerTeacher Substitute mobile web pages, the Home page appears. This page serves as the central point from which you begin your PowerTeacher Substitute mobile web pages session. The PowerTeacher Substitute mobile web pages Home page consists of the following main areas:

- Navigation bar
- ID bar
- Schedule
- Menu

Navigation Bar

The navigation bar appears at the top of the PowerTeacher Substitute mobile web pages Home page and is common to every page in the application. The navigation bar includes the following information:

Field	Description
Home	Click to return to the Home page.
[Page]	The page name you are currently viewing appears.
Sign out	Click to sign out of PowerTeacher Substitute mobile web pages. For more information, see *Sign Out of PowerTeacher Substitute Mobile Web Pages*.

ID Bar

The ID bar appears just below the navigation bar and displays your name. In an effort to ensure that your account is secure, and your information protected, the date of the last time you signed in to appears next to your name. This information can be used to alert you to any unusual account activity. If you experience any unusual account activity, report it to your school.

Schedule

The name of the current day's schedule appears. Click to view the Bell Schedule page, which provides detailed information, including the periods, start times, stop times and duration of each period.

Menu

The main menu includes links to the following functions:

Field	Description
Daily Bulletin	Click to read your school's daily bulletin. For more information, see *Daily Bulletin*.
Attendance	Click to record meeting attendance. For more information, see *Attendance*.
Lunch Counts	Click to submit lunch counts. For more information, see *Lunch Counts*.

Work with the PowerTeacher Substitute Mobile Web Pages Main Menu

Note: Access to information is based on your page-level permissions. For more information, see *Security Permissions*. Additionally, if certain information does not appear, that information may be set to “hidden” by your school’s PowerSchool administrator.

Attendance

How to Record Meeting Attendance

1. On the Home page, click **Attendance**. The Attendance page appears.

   Note: A dot appears next to each class' **Chair** icon. The color of the dot indicates whether or not you've taken attendance for that class. A clear dot indicates attendance has not been taken. A yellow dot and fraction indicates partial attendance has been taken. A green dot indicates attendance has been taken.

2. Click the class for which you want to record attendance. The Record Meeting Attendance page appears.
3. Click **Att Code**. The Att Code page appears.
4. Select the attendance code you want to assign. The Record Meeting Attendance page appears.
5. Click **Submit**. The Home page appears.

Daily Bulletin

How to View the Daily Bulletin

1. On the Home page, click **Daily Bulletin**. The Daily Bulletin page displays today's announcements and links to previous or future bulletins.
2. Click the zoom icons increase or decrease the font size for better readability.
3. Click the date links at the top or bottom of the page to view that day's bulletin.
4. Click the e-mail address at the bottom of the page to send a message to the person who issues the announcements. Depending on your default e-mail application, an e-mail form appears.
5. Complete the e-mail message.
6. Click **Send**.

Lunch Counts

How to Submit Lunch Counts

1. On the Home page, click **Lunch Counts**. The Lunch Counts page appears.
2. Click the class for which you want to submit lunch counts. The Submit Lunch Counts page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Student Breakfast	Enter the number of student breakfasts.
Adult Breakfast	Enter the number of adult breakfasts.
Adult Lunch	Enter the number of adult lunches.
Student Lunch	Enter the number of student lunches.
Student A La Carte	Enter the number of student à la carte meals.
Adults A La Carte	Enter the number of adult à la carte meals.
Milk	Enter the total number of students and adults buying milk.

Other 1	Enter the number of Other 1 meals (optional). **Note:** The field represents an additional meal type that may be used for special request meals, such as a vegetarian dish or a kosher dish.
Other 2	Enter the number of Other 2 meals (optional). **Note:** See *Other 1*.

4. Click **Submit** to enter the counts. The Home page appears.

Quit PowerTeacher Substitute Mobile Web Pages

Sign Out of PowerTeacher Substitute Mobile Web Pages

When finished working in PowerTeacher Substitute mobile web pages, it is important to sign out of the application.

How to Sign Out of PowerTeacher Substitute Mobile Web Pages

1. Return to the Home page.
2. Click **Sign Out** in the navigation bar. The Substitute Teacher Sign In page appears. You must enter your username and password again to redisplay the PowerTeacher Substitute mobile web pages Home page.

Password Rules Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

With the introduction of Password Rules Management, PowerSchool now provides PowerSchool administrators the ability to configure various rules that are applicable when Students, Admins and Teachers, and Parents establish and maintain their passwords, including:

- Password Reset Rule
- Password Complexity Rules
- Password Expiration Rule
- Password Reuse Rule
- Account Lockout Rule

Once Password Rules Management is configured, Password Rules Management functionality appears throughout PowerSchool, the PowerSchool Student and Parent portal, PowerTeacher, PowerTeacher Administrator and PowerTeacher Gradebook.

Quick Start

To get started immediately, perform the following tasks to set up and begin using Password Rules Management:

- Password Rules Management Configuration
- Configure Password Rules
- Configure Student Password Rules (optional)
- Work with Password Rules

Setup

Password Rules Management provides PowerSchool administrators the ability to configure various rules that are applicable when Students, Parents, Admins, and Teachers establish and maintain their passwords. The rules can be configured separately for each group of user types, as follows:

- Students
- Admins and Teachers
- Parents

Upgrading PowerSchool

When upgrading, Password Rules Management is automatically set to the following default values for students, admins and teachers, and parents:

- Password Reset Rule – Disabled.
- Password Complexity Rules (Minimum characters) – Set to **1** for students, admins, and teachers. Set to **6** for parents.
- Password Complexity Rules (Password contains) – Disabled.
- Password Expiration Rule – Disabled.
- Password Reuse Rule – Disabled.
- Account Lockout Rule – Disabled.

Once you have configured Password Rules Management, subsequent upgrades will preserve your configurations.

During the upgrade, user account data is migrated into the new Password Rules Management PCAS tables. Once the upgrade is completed, a comma-delimited file is created in the PowerSchool logs folder (the same folder containing pslog.txt and dalx.log) called PCAS_Migrate.csv. The file only contains errors and modified usernames. If the file appears empty, all accounts migrated successfully and without change. To open the file, use a spreadsheet application, such as Excel. The file displays original usernames, new usernames where the original usernames had to be modified, and any errors that were encountered during the migration. Possible errors include:

- Failed to migrate: Indicates that the account could not be migrated for unexpected reasons.
- Truncated password to 40 characters: Indicates that the user's password was too long for an admin-entered password and has been truncated to the first 40 characters of the password.

- Failed Rename in Legacy Table (PCAS and Legacy out of sync!): Indicates that the new username was created in PCAS but was not copied back over to the legacy table overwriting the original username; as a result, the user will not be able to sign in; therefore, manually change the user's username via the appropriate PowerSchool page.

Note: If you are unable to identify a user by their username, the DCID value for that particular row in the appropriate table is given; you can use the DCID value to bring up the matching record in USM.

Using the information provided, you can notify users who usernames had to be modified (user names are modified to prevent duplicate user names from migrating to the new Password Rules Management PCAS tables, as well as to troubleshoot any data migration issues.

Installing PowerSchool

When installing, Password Rules Management is automatically set to the following default values for students, admins and teachers, and parents:

- Password Reset Rule – Enabled.
- Password Complexity Rules (Minimum characters) – Set to **7**.
- Password Complexity Rules (Password contains) – Enabled.
- Password Expiration Rule – Set to **60** days.
- Password Reuse Rule – Set to **5**.
- Account Lockout Rule – Set to **5**.

Configure Password Rules

Using Password Rules Management, you define password reset, complexity, expiration, reuse, and lockout rules based on your district's needs. Once configured, user may encounter the following messages:

Occurs	Message	Action
Sign In	Your password was set by the system administrator. Please change your password.	User to reset their password. Refer them to appropriate *How to Reset Your Password* procedure.

Sign In	Your password has expired. Please create a new password.	User to reset their password. Refer them to appropriate *How to Reset Your Password* procedure.
Sign In	The number of sign in attempts for this account has been exceeded. Contact your school directly for assistance.	User to contact you to unlock their account. See *How to Unlock an Account*.
Reset Password Change Password	Current password is not correct.	User to re-enter password accordingly.
Reset Password Change Password	New password must be at least [number] characters long.	User to re-enter password accordingly.
Reset Password Change Password	New password must contain at least one uppercase and one lowercase letter.	User to re-enter password accordingly.
Reset Password Change Password	New password must contain at least one letter and one number.	User to re-enter password accordingly.
Reset Password Change Password	New password must contain at least one special character.	User to re-enter password accordingly.
Reset Password Change Password	The verification password you enter must match the new password.	User to re-enter password accordingly.
Reset Password Change Password	The password entered was previously used. Please enter a new password.	User to re-enter password accordingly.

How to Configure Password Rules

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Security, click **Password Rules Management**. The Password Rules Management page appears. By default, the Password Rules tab is selected.
3. Use the following table to enter information in the fields:

Field	Description
Password Reset Rule	To require a user to reset their password upon first signing in, select the applicable checkboxes: **Note:** If you do not want to apply this rule, leave the checkbox blank. • Select the **Students** checkbox to apply this rule to students' passwords. • Select the **Admins and Teachers** checkbox to apply this rule to administrators' and teachers' passwords. • Select the **Parents** checkbox to apply this rule to parents' passwords.
Password Complexity Rules	Indicate the minimum number of characters a password must contain (value between 1 and 24): • Enter the desired number in the **Students** field to apply this rule to students' passwords. • Enter the desired number in the **Admins and Teachers** field to apply this rule to administrators' and teachers' passwords. • Enter the desired number in the **Parents** field to apply this rule to parents' passwords. To require a user's password contain at least 1 uppercase letter, 1 lowercase letter, 1 special character, and 1 numeric character, select the applicable checkboxes: **Note:** If you do not want to apply this rule, leave the checkbox blank.

	• Select the **Students** checkbox to apply this rule to students' passwords. • Select the **Admins and Teachers** checkbox to apply this rule to administrators' and teachers' passwords. • Select the **Parents** checkbox to apply this rule to parents' passwords.
Password Expiration Rule	Indicate the number of days a user may use a password before being required to enter a new password: **Note:** If you do not want to apply this rule, enter **0**. • Enter the desired number in the **Students** field to apply this rule to students' passwords. • Enter the desired number in the **Admins and Teachers** field to apply this rule to administrators' and teachers' passwords. • Enter the desired number in the **Parents** field to apply this rule to parents' passwords.
Password Reuse Rule	Indicate the number of different passwords a user must use before a password may be reused after resetting the password: **Note:** If you do not want to apply this rule, enter **0**. • Enter the desired number in the **Students** field to apply this rule to students' passwords. • Enter the desired number in the **Admins and Teachers** field to apply this rule to administrators' and teachers' passwords. • Enter the desired number in the **Parents** field to apply this rule to parents' passwords.
Account Lockout Rule	Indicate the number of times users may enter an incorrect password before being locked out: **Note:** If you do not want to apply this rule, enter **0**.

	• Enter the desired number in the **Students** field to apply this rule to students' passwords. • Enter the desired number in the **Admins and Teachers** field to apply this rule to administrators' and teachers' passwords. • Enter the desired number in the **Parents** field to apply this rule to parents' passwords. **Note:** To unlock an account, see *Locked Accounts*.

5. Click **Submit**. A confirmation message appears.

How to Reset Password Rules Default Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Security, click **Password Rules Management**. The Password Rules Management page appears. By default, the Password Rules tab is selected.
3. Click **Load Default Settings**. A confirmation message appears indicating the default settings have been loaded.

   Note: For details about default values, see *Installing PowerSchool*.

4. Click **Submit**. A confirmation message appears indicating your changes have been saved.

Configure Student Password Rules

Once password rules are established, you have the option to provide students with the ability to change their own passwords when using the PowerSchool Student and Parent portal. Settings on this page affect the ability of students to change their own passwords based on their school and grade level. If a student is able to change their password, any password rules settings enabled for students will be enforced for the password they choose.

Note: By default, students may not change their passwords, This feature must be enabled.

How to Configure Student Password Rules

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Security, click **Password Rules Management**. The Password Rules Management page appears. By default, the Password Rules Management tab is selected.
3. Click the **Student Password Management** tab. The Student Password Management tab appears selected.
4. Locate the name of the school for which you want students to be able to change their own passwords.
5. For the selected school, choose the grade level for which you want students to be able to change their own passwords from the **Enable At and Above Grade** pop-up menu.
6. Repeat Step 5 through Step 6 for each school for which you want students to be able to change their own passwords
7. Click **Submit**. A confirmation message appears.

Invalid Sign In Attempts

Using the Invalid Sign In Attempts Report, you can monitor sign in attempts to ensure system security.

How to View Invalid Sign In Attempts

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Security, click **Report of Invalid Sign In Attempts**. The Report of Invalid Sign In Attempts page appears.
3. Use the following table to enter information in the fields:

Field	Description
Start Date	To search for invalid sign in attempts for a specified date range, enter the start date using the format mm/dd/yyyy. Otherwise, leave the field blank. **Note:** If you only enter a start date, the system searches from that date to today's date.
End Date	To search for invalid sign in attempts for a specified date range, enter the end date using the format mm/dd/yyyy. Otherwise, leave the field blank.

Source IP Address	To search for invalid sign in attempts using a specific IP address, enter the IP address in the field. Otherwise, leave the field blank.
Minimum Invalid Attempts	To search for invalid sign in attempts based on a minimum number of sequential attempts, enter a number in the field. Otherwise, leave the field blank.
User Type	To search for invalid sign in attempts by a specific portal, choose the appropriate portal from the pop-up menu: • **Parent** • **PowerSchool Administrator** • **PowerTeacher Administrator** • **Student** • **System Management Console Administrator** • **Teacher** Otherwise, leave the default setting of **All Users** selected.
Attempted User Name	To search for invalid sign in attempts based on specific user, enter the user's username in the field. Otherwise, leave the field blank.
Attempt Type	To search for sign in attempts based on validity, select the appropriate option: • Select **Valid Users** to search for invalid sign in attempts where the user name entered matches a user name in the system. • Select **Invalid Users** to search for invalid sign in attempts where the user name entered does not match a user name in the system. Otherwise, leave the default setting of **All Users** selected.

5. Click the **Search** icon. The following search results display based on the criteria you entered:
    - User Name – Click to view user account details. If the account is locked, you can unlock the account by clicking the **Unlock** button.
    - Valid User

- User Type
- Source IP Address
- Attempt Date
- Attempt Time

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. If many results appear, use the quick navigation links such as **<< first** and **next >** to navigate between the different pages of results.

Locked Accounts

Using the Locked Accounts Report, you can monitor locked accounts to ensure system security. A user account may be locked automatically if **Account Lockout Rules** is enabled and the user has exceeded the number of sign in attempts allowed. For more information, see *Password Rules Configuration*. Accounts only appear on this page if they have been automatically locked.

How to View Locked Accounts

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Security, click **Locked Accounts**. The Manage Locked Accounts page appears.
3. Click the appropriate portal from the pop-up menu:
    - **All**
    - **Admins**
    - **Teachers**
    - **Parents**
    - **Students**
4. The following information appears for each locked account:

Field	Description
Username	The last name, first name, and username of the user that is locked out. Click to access the Security Settings page.
Account Type	Indicates the portal for which the user has an account.
Lock Details	The date, time, and reason the user is locked out of account.

How to Unlock an Account

Use this procedure to unlock a user's account whereby allowing them access to PowerSchool, PowerTeacher, or the PowerSchool Student and Parent portal.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Locked Accounts**. The Manage Locked Accounts page appears.
3. Click the appropriate portal from the pop-up menu:
    - **All**
    - **Admins**
    - **Teachers**
    - **Parents**
    - **Students**
4. Do one of the following:
    - Click **Unlock** next to each account you want to unlock.
    - Click **Unlock All [Name of Selected Portal] Accounts** to unlock all locked accounts for the selected portal.
5. Click **Submit**.

Work with Password Rules

Once Password Rules Management is configured, Password Rules Management functionality appears throughout PowerSchool, the PowerSchool Student and Parent Portal, PowerTeacher, PowerTeacher Administrator and PowerTeacher Gradebook.

PowerSchool

Note: Information in this section appears in the PowerSchool online help, as well as *The Basics User Guide* available on PowerSource.

- *How to Sign In to PowerSchool*
- *How to Reset Your Password*
- *How to Change Your Password*

PowerSchool Student and Parent Portal Administrator

Note: Information in this section appears in the PowerSchool online help, as well and the *PowerSchool Student and Parent Portal Administrator Guide* available on PowerSource.

- *How to Create a Parent Account* (see *How to Enter a New Contact*)
- *How to Reset a Parent Account Password* (see *How to Reset a Contact's Password*)

PowerSchool Student and Parent Portal

Note: Information in this section appears in the PowerSchool Student and Parent portal online help, as well as in the *PowerSchool Student and Parent Portal User Guide* available on PowerSource.

- *How to Sign In to PowerSchool Student and Parent Portal*
- *How to Reset Your Password*
- *How to Recover Your Password*
- *How to Create a Parent Account*
- *How to Change Your Account Preferences*

PowerTeacher

Note: Information in this section appears in the PowerTeacher online help, as well as the *PowerTeacher Portal User Guide* available on PowerSource.

- *How to Sign In to PowerTeacher*
- *How to Reset Your Password*
- *How to Change Your Password*

Pearson Digital Learning Platforms User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool includes a close integration with Pearson Digital Learning Platforms, which allows authorized PowerSchool users to seamlessly transition from PowerSchool into Pearson Digital Learning Platforms.

Note: PowerSchool comes pre-configured with these settings. No changes are typically required in this section.

Setup

Before you can begin using Pearson Digital Learning Platforms, you must perform the following setup items:

- View General Information (optional)
- Configure Single Sign-On Settings
- View Identity Attributes (optional)
- Configure SAML Inline Authentication
- Manage Link Details (optional)
- Configure School Access (optional)
- Enable Sign-On

View General Information

Once the Pearson Digital Learning Platforms plugin is installed, it appears in the Installed Plugins section on the Plugin Management Dashboard page.

How to View General Information

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page displays the following information in the General Information section:

Field	Description
Plugin Name	The name of the plugin, such as Pearson Digital Learning Platforms.
Plugin Description	A description of the plugin, such as Integration with Pearson LMS products.
Plugin Version	The version number of the plugin, such as 1.0.

Publisher	The name of the publisher, such as PowerSchool.
Publisher Email	The email of the publisher, such as powerschoolsupport@pearson.com.

Configure Single Sign-On Settings

Using the Single Sign-On Setup for Pearson Digital Learning Platforms page, you can configure the settings needed for establishing a successful SSO connection between PowerSchool and Pearson Digital Learning Platforms making the transition between PowerSchool and Pearson Digital Learning Platforms seamless.

Note: In addition to configuring single-sign on settings for PowerSchool, verify that your Pearson Digital Learning Platforms server is also configured for SSO. If it is not, a successful SSO connection between PowerSchool and Pearson Digital Learning Platforms cannot be established. For assistance, contact Pearson Digital Learning Platforms Client Solutions Center.

How to Configure Identity Provider Settings

Use this section to set up the SSO connection from PowerSchool to Pearson Digital Learning Platforms.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **Single Sign-On Service**. The Single Sign-On Setup for Pearson Digital Learning Platforms page appears.
6. Use the following table to enter information in the PowerSchool Identity Provider Settings fields:

   Note: All fields are required.

Field	**Description**

Name	The PowerSchool identity provider's name. The default is set to **PowerSchool IDP**.
Entity ID	The PowerSchool server's public URL. The value is automatically populated using the values entered on the Global Server Settings page (**System > System Settings > Global Server Settings > PowerSchool Configuration - External Access** fields). Verify this is the correct value and update if necessary.
Single Sign-On Certificate	Choose the certificate the PowerSchool IDP will use for single sign-on authentications.

7. Do one of the following:
    - To continue, see Step 6 of *How to Configure Service Provider Settings*.
    - Click **Save**. A confirmation message appears.

How to Configure Service Provider Settings

Use this section to configure PowerSchool to accept SSO requests from Pearson Digital Learning Platforms.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **Single Sign-On Service**. The Single Sign-On Setup for Pearson Digital Learning Platforms page appears.
6. Use the following table to enter information in the Pearson Digital Learning Platforms Service Provider Settings fields:

    Note: All fields are required.

Field	Description

Name	The Pearson Digital Learning Platforms service provider's name. **Note:** Do not change this value.
Base URL	Enter the Pearson Digital Learning Platforms service provider's base URL.
Metadata URL	Enter the Pearson Digital Learning Platforms service provider's metadata URL.
Pearson Digital Learning Platforms Host Server and Port	Enter the Pearson Digital Learning Platforms service provider's host server and port.

7. Click **Save**. A confirmation message appears.
8. To continue, see *How to Configure School Access Settings*.

How to View PowerSchool User Identifying Elements for Single Sign-On

Use this section to view the SAML SSO Attributes used for establishing successful SSO connection between PowerSchool and Pearson Digital Learning Platforms.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **Single Sign-On Service**. The Single Sign-On Setup for Pearson Digital Learning Platforms page appears.
6. Use the following table to view information in the PowerSchool User Identifying Elements for Single Sign-On section:

Field	**Description**

Number	The sequential number of the PowerSchool user-identifying element.
Name	The name of the PowerSchool user-identifying element, such as authenticationId.

View Identity Attributes

Using the Identity Attribute Configuration page, you can view the unique identifier for an object.

Note: PowerSchool comes pre-configured with these settings. These settings may only be modified by PowerSchool Technical Support either by accessing the Identity Attribute Configuration page as a Maintenance User or by adding **plugin.console.is_identity_attr_config_enabled** with a value of **1** to the Prefs table (once modifications have been made, the pref then needs to be removed from the Prefs table). For assistance, contact PowerSchool Technical Support.

Note: Suggested default settings are for single-tenant environments. However, identity attributes may also be configured for multi-tenant environments. When configuring identity attributes, it is recommended that you either configure for a single-tenant environment or a multi-tenant environment, not both. "Single-tenant" refers to a single, district-wide instance of PowerSchool integrated with a single, district-wide version of Pearson Digital Learning Platforms. "Multi-tenant" refers to a district-wide PowerSchool integrated with a statewide or multi-district-wide version of Pearson Digital Learning Platforms.

How to View Identity Attributes

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **Identity Attribute Configuration**. The Identity Attribute Configuration page for Pearson Digital Learning Platforms appears.
6. Use the following table to view information on this page:

Field	Description
Students	The unique identifier of this object. By default, this is set to **PSGUID**.
Users	The unique identifier of this object. By default, this is set to **PSGUID**.
Guardian	The unique identifier of this object. By default, this is set to **PSGUID**.
Schools	The unique identifier of this object. By default, this is set to **SCHOOL_NUMBER**.
District	The unique identifier of this object. By default, this is set to **DISTRICT 0**.
Sections	The unique identifier of this object. By default, this is set to **DCID**.
Assignments	The unique identifier of this object. By default, this is set to **DCID**.

Configure SAML Inline Authentication

Once you have configured the Event API, you can then configure SAML inline authentication allowing users to sign directly in to Pearson Digital Learning Platforms without using the SSO link within PowerSchool. For example, if an administrator bookmarks their My Pearson Digital Learning Platforms page and SAML Inline Authentication is configured, when the administrator clicks their bookmark, they will be able to sign directly in to Pearson Digital Learning Platforms.

How to Configure SAML Inline Authentication

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.

4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **SAML Inline Authentication**. The SAML Inline Authentication page for Pearson Digital Learning Platforms appears.
6. Use the following table to enter information:

Field	Description
User Types	PowerSchool user types for which SAML inline authentication may be configured: • Admin • Guardian • Student • Teacher
Allow SSO Authentication	Select the checkbox for each user type that you want to allow SSO authentication. Otherwise, leave blank.
Application Launch	For each user type that you have allowed SSO authentication, do one of the following: • Select the checkbox to indicate you want a new browser window to open when signing directly in to Pearson Digital Learning Platforms. • Deselect the checkbox to indicate you want Pearson Digital Learning Platforms to appear in the same browser window as PowerSchool when signing directly in to Pearson Digital Learning Platforms.

7. Click **Save**. The Pearson Digital Learning Platforms Setup page appears.

Manage Link Details

Using the Link Details page, you can quickly and easily view detailed information about Pearson Digital Learning Platforms links that have been added to PowerSchool as part of the Pearson Digital Learning Platforms installation. Additionally, you can control which schools can view the Pearson Digital Learning Platforms links.

Note: This procedure is only applicable if the plugin configuration file you installed declares navigation links.

How to Manage Link Details

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **Link Details**. The Link Details page for the selected plugin displays the following information for each portal:

Field	Description
[Portal]	The name of the portal: • Administrator Portal • Teacher Portal • Guardian Portal • Student Portal
Schools	For detailed information, see *Configure School Access*. **Note:** This setting controls only the display of links associated to a plugin. This does not restrict users from accessing content referred to by these links. Only the display of links based on the user's school context is affected.
Displayed in # / # Schools	Indicates the number of school the link displays in. **Note:** Only displays for Teacher Portal.
URL	The URL of the link, including <HostName>:<Port><Path>.
Display Text	The link title text appears.

UI Location	The location(s) where the link appears in the PowerSchool user interface.
SSO	Indicates whether or not the link is used for SSO.

Configure School Access

Using the Link Display by School drawer, you can control which schools can view Pearson Digital Learning Platforms links.

Note: Third party links appear in PowerSchool based on the navigation links defined in the plugin configuration file.

Note: This procedure is not applicable to plugins that handle their own school level access.

Note: School-level permissions within PowerTeacher Pro 1.0 will use the permissions of the school from which PTP was launched.

How to Configure School Access

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Pearson Digital Learning Platforms**. The Pearson Digital Learning Platforms Setup page appears.
5. Click **Link Details**. The Link Details page for the selected plugin appears.
6. Click **Schools** next to the portal for which you want to configure school access. The Link Display by School drawer opens.
7. Use the following table to enter information:

Field	Description
Schools Where Links Not Displayed	Schools that have not been granted access to the plugin appear. To grant access to a plugin, highlight one or more schools in the list and click the arrow (>). The selected school appears in the Schools with access to plugin column.

	Note: To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. To grant access to a plugin for all schools, click the double arrow (>>). All schools appear in the Schools with access to plugin column.
Schools Where Links Displayed	Schools that have been granted access to the plugin appear. To revoke access to a plugin, highlight one or more schools in the list and click the arrow (<). The selected school appears in the Schools without access to plugin column. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. To revoke access to a plugin for all schools, click the double arrow (<<). All schools appear in the Schools without access to plugin column.

8. Click **Submit**. The Link Display by School drawer closes, and a confirmation message appears.
9. To continue, see Step 4 of *How to Enable Single Sign-On*.

Enable Single Sign-On

Once Pearson Digital Learning Platforms has been configured, you can use the Plugin Management Dashboard page to enable Pearson Digital Learning Platforms single sign-on.

Note: By default, Pearson Digital Learning Platforms is not enabled.

How to Enable Single Sign-On

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Select the **Enable/Disable** checkbox for the Pearson Digital Learning Platforms plugin. The Enable Plugin drawer appears.
5. Review the content.

Note: If you have installed a plugin that is dependent on page customizations, you must enable page customizations on the Customizations page. For more information, see *Customizations*.

Note: If PowerSchool encounters errors with the plugin, detailed information about the errors appears and you may not proceed with enabling the plugin.

6. Click **Enable** to proceed. A confirmation message appears.

How to Disable How to Enable Single Sign-On

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Deselect the **Enable/Disable** checkbox for the Pearson Digital Learning Platforms plugin. The Disable Plugin pop-up appears.
5. Click **Yes**. A confirmation message appears.

Launch Pearson Digital Learning Platforms

Once Pearson Digital Learning Platforms is set up, users can launch Pearson Digital Learning Platforms from within PowerSchool while keeping their PowerSchool session active allowing them to work in both applications simultaneously. Additionally, if SAML inline authentication settings have been configured, users may sign directly in to Schoolnet without using the SSO link within PowerSchool.

Note: The link only appears if the plugin is enabled, the link is set to display for the selected school, and if you belong to a user access role that has the capability associated to the link.

Note: When a new student or teacher user is added to PowerSchool, it may take up to 24 hours for their user profile has been established. During that time, Pearson Digital Learning Platforms may be launched; however, content will not yet be available.

Launch in the PowerSchool Student and Parent Portal

Use this procedure to launch Pearson Digital Learning Platforms in the PowerSchool Student and Parent portal.

How to Launch in the PowerSchool Student and Parent Portal

1. Sign in to the PowerSchool Student and Parent portal.

   Note: For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Parent Portal User Guide* available on PowerSource.

2. On the start page, click **Pearson Courses** in the navigation menu. Pearson Digital Learning Platforms launches in a separate window (or tab depending on your browser setting).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in the PowerSchool Student and Parent portal, your session may time out. If so, you need to sign in again.

3. When you are finished working in Pearson Digital Learning Platforms, be sure to sign out of the application.

4. When you are finished working in the PowerSchool Student and Parent portal, be sure to sign out of the PowerSchool Student and Parent portal.

Launch in PowerTeacher

Use this procedure to launch Pearson Digital Learning Platforms in PowerTeacher.

How to Launch in PowerTeacher

1. Sign in to PowerTeacher.

   Note: For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. Click the **Applications** button (an upward-right arrow) in the navigation toolbar. The Applications drawer slides into view.
3. Click **Pearson Courses**. Pearson Digital Learning Platforms launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerTeacher, your session may time out. If so, you need to sign in again.

4. When you are finished working in Pearson Digital Learning Platforms, be sure to sign out of the application.
5. When you are finished working in PowerTeacher, be sure to sign out of PowerTeacher.

Sign In as an Administrator

Use this procedure to sign directly in to Pearson Digital Learning Platforms as an Administrator without using the SSO link within PowerSchool.

Note: SAML inline authentication settings must be configured.

How to Sign In as an Administrator

1. Open your Web browser to your school's Pearson Digital Learning Platforms URL. The Single Sign-On page appears.
2. Select your district from the pop-up menu.

3. Click **Continue**. The Single Sign-On page refreshes.
4. Click **Sign in as an Administrator**. The Administrator Sign In page appears.
5. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view PowerSchool from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters display as asterisks (*****) to ensure greater security when you sign in.

6. Click **Sign In**. Pearson Digital Learning Platforms launches.

   Note: Depending on SAML Inline Authentication settings, Pearson Digital Learning Platforms either replace your existing browser window or opens in a new browser window.

Sign In as a Student

Use this procedure to sign directly in to Pearson Digital Learning Platforms as a Student without using the SSO link within PowerSchool.

Note: SAML inline authentication settings must be configured.

How to Sign In as a Student

1. Open your Web browser to your school's Pearson Digital Learning Platforms URL. The Single Sign-On page appears.
2. Select your district from the pop-up menu.
3. Click **Continue**. The Single Sign-On page refreshes.
4. Click **Sign in as a Student**. The Student and Parent Sign In page appears.
5. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view the PowerSchool Student and Parent portal from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters appear as asterisks (*) to ensure greater security when you sign in.

6. Click **Sign In**. Pearson Digital Learning Platforms launches.

   Note: Depending on SAML Inline Authentication settings, Pearson Digital Learning Platforms either replaces your existing browser window or opens in a new browser window.

Sign In as a Teacher

Use this procedure to sign directly in to Pearson Digital Learning Platforms as a Teacher without using the SSO link within PowerSchool.

Note: SAML inline authentication settings must be configured.

How to Sign In as a Teacher

1. Open your Web browser to your school's Pearson Digital Learning Platforms URL. The Single Sign-On page appears.
2. Select your district from the pop-up menu.
3. Click **Continue**. The Single Sign-On page refreshes.
4. Click **Sign in as a Teacher**. The Teacher Sign In page appears.
5. Use the following table to enter information in the fields:

Field	Description

Select Language	Choose the language in which you want to view PowerTeacher from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters appear as asterisks (*) to ensure greater security when you sign in.

6. Click **Sign In**. Pearson Digital Learning Platforms launches.

   Note: Depending on SAML Inline Authentication settings, Pearson Digital Learning Platforms either replaces your existing browser window or opens in a new browser window.

Plugin Management User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

The Plugin Management Dashboard provides you with a central location from which to manage plugins. Plugins are components that "plug in" to PowerSchool and add a specific feature or service to PowerSchool. PowerSchool provides a number of plugins that are available by default in the application, as well as the ability to quickly and easily install new plugins.

Setup

Before you can begin using a new plugin, perform the following setup items:

- Install Plugin
- View Plugin Information (optional)
- View SSO (optional)
- Manage Link Details (optional)
- Configure School Access (optional)
- View OAuth Client Credentials (optional)
- Configure Page Size (optional)
- Enable Plugin
- Update Plugin Version
- Configure User Access Roles (optional)
- Assign User Access Roles (optional)

Configuration

Install Plugins

In order to successfully install a new plugin, the plugin installation file must have an .xml or .zip extension.

Note: If the plugin installation file includes a PowerQuery, the PowerQuery name may not exceed 200 characters.

How to Install a Plugin

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Install**. The Plugin Install page appears.
5. Do one of the following:
    - Click **Choose File** to select a plugin installation file to install.
    - Click **Browse...** to browse for a plugin.
6. Click **Install**. A confirmation message appears.

How to Install a Plugin That Requests/Requires Registration

Use this procedure if the plugin you are installing requests/requires registration. PowerSchool will send data to the registration server based on the plugin configuration.

Note: This information is contained within the plugin .xml file.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Install**. The Plugin Install page appears.
5. Do one of the following:
    - Click **Choose File** to select a plugin installation file to install.
    - Click **Browse...** to browse for a plugin.

    If the plugin installation is successful, the Plugin Registration pop-up appears and displays the information that will be sent to the registration server.

6. Click **Register** to send the registration information automatically. The Registration Results pop-up appears. If the registration was successful, a confirmation message appears. If the registration was unsuccessful, an error message appears.

    Note: Click **Cancel** to send the registration information manually. The Plugin Registration pop-up closes.

View Installed Plugins

Once a plugin is installed, it appears in the Installed Plugins section on the Plugin Management Dashboard page.

How to View Installed Plugins

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Use the following table to view information in the Installed Plugins section:

Field	Description

Name	The name of the plugin.
Version	The version number of the plugin.
Enable/Disable	Indicates whether or not the plugin is enabled.

How to View Plugin Information

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Use the following table to view information in the General Information section:

Field	Description
Plugin Name	The name of the plugin.
Plugin Description	A description of the plugin.
Plugin Version	The version number of the plugin.
Publisher	The name of the publisher.
Publisher Email	The email of the publisher.
Enabled	Indicates whether or not the plugin is enabled.
Event Subscription URL	The URL provided by the plugin used by PowerSchool to send events for that plugin.

6. Use the following table to view information in the Installed Resources section:

Note: Information appears if plugin contains the specific resource.

Field	Description
Schema Extensions	Click the arrow to expand the section to view the following Schema Extensions information: • Extensions • Tables • Fields **Note:** If a plugin is enabled, schema extensions are formatted into tables. If a plugin is not enabled, schema extensions are presented in XML format.
Data Access Requests	Click the arrow to expand the section to view the following Data Access Requests information: • Table Name • Field Name • FLS Controlled • Blacklisted • Status
Named Queries	Click the arrow to expand the section to view the following Named Queries information: • Query • Query Arguments • Returned Columns • Query SQL **Note:** If a plugin is enabled, named queries are formatted into tables. If a plugin is not enabled, named queries are presented in XML format.
Web Resources	Click the arrow to expand the section to view the following Web Resources information:

	• Resource • Mime Type
Permission Resources	Click the arrow to expand the section to view the following Permission Resources information: • Name • Content
Message Resources	Click the arrow to expand the section to view the following Message Resources information: • Resource • Mime Type • Content

7. To print resource details, click **Print Resource Details**. The Print Preview for your browser appears.
8. Click **Print**. A report detailing the following information is generated:
    - Plugin Name
    - Plugin Description
    - Plugin Version
    - Publisher
    - Publisher Email
    - Enabled
    - Event Subscription URL
    - Installed Resources

How to View Information for All Plugins

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Resource Report**. The Plugins Resource Details page appears.
5. View information in the General Information section. For field descriptions, see *How to View General Plugin Information for a Plugin*.

6. View information in the Installed Resources section. For field descriptions, see *How to View General Plugin Information for a Plugin*.
7. Do one of the following:

Field	Description
Expand All	Click to expand all the sections.
Collapse All	Click to collapse all the sections.
Print All	1. Click to generate a report detailing information for all plugins. The Print Preview for your browser appears. 2. Click **Print**. A report detailing the following information is generated: • Plugin Name • Plugin Description • Plugin Version • Publisher • Publisher Email • Enabled • Event Subscription URL • Installed Resource

How to Run the Plugins Resource Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Plugins Resource Report** under Plugins. The Plugins Resource Report page appears.
3. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
4. Click **Submit**. The Plugins Resource Details page appears.
5. To continue, see Step 7 of *How to View Information for All Plugins*.

View Single Sign-On Settings

Using the Single Sign-On Settings page, you can quickly and easily view detailed information about single sign-on settings that have been added to PowerSchool as part of the plugin installation. Additionally, you can use this page to correct or update single sign-on settings as needed.

Note: This procedure is only applicable if the plugin configuration file you installed declares single sign-on links.

How to View Single Sign-On Settings (OpenID)

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Click **Single Sign-On Settings**. The Single Sign-On Settings page for the selected plugin displays the following information:

   Note: Update information if needed.

Field	Description
Name	The name of the plugin, such as Plugin. **Note:** This field is read-only.
Host Name or IP Address	The relying party's host name, such as plugin.com. **Note:** This is a required field.
Port	The relying party's port number. The default value is **443**. **Note:** This is a required field.

6. Click **Save**. A confirmation message appears.

How to View Single Sign-On Settings (SAML)

Note: This procedure is for a plugin that defines PowerSchool as a SAML Identity Provider. For a plugin that defines PowerSchool as a Service Provider, see *SAML Single Sign-On*.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Click **Single Sign-On Settings**. The Single Sign-On Settings page for the selected plugin appears.
6. Use the following table to enter information in the PowerSchool Identity Provider Settings fields:

   Note: Update information if needed.

Field	Description
Name	The PowerSchool identity provider's name. The default is set to **PowerSchool IDP**.
Entity ID	The PowerSchool identity provider's entity ID. The default value is a unique 36 character alphanumeric string prefaced with **https://**.
Single Sign-on Certificate	Choose the appropriate PowerSchool identity provider's single sign-on certificate from the pop-up menu. This is the certificate that contains the PowerSchool X.509 client certificate.
View PowerSchool IDP Metadata	The PowerSchool IDP Metadata describes the services offered by the PowerSchool identity provider along with the names and formats of data items passed to the service provider when a user is authenticated. 1. Click to view the PowerSchool identity provider's metadata. A separate window appears. 2. When done viewing, close the window.

7. Use the following table to enter information in the Service Provider Settings fields:

   Note: Update information if needed.

Field	Description

Name	The service provider’s name. The value is part of the data imported during plugin install.
Base URL	The service provider’s base URL. This is the root of all URLs for the service provider application.
Metadata URL	The service provider’s metadata URL. The value is supplied by the service provider, which allows the IDP to communicate with the service provider application.
Host Server and Port	The service provider's entity-ID, which is used to identify the service provider when the service provider initiates single sign-on.

8. Click **Save**. A confirmation message appears.

Manage Link Details

Using the Link Details page, you can quickly and easily view detailed information about links that have been added to PowerSchool as part of the plugin installation. Additionally, you can control which schools can view installed plugin links.

Note: This procedure is only applicable if the plugin configuration file you installed declares navigation links.

How to Manage Link Details

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Click **Link Details**. The Link Details page for the selected plugin displays the following information for each portal:

Field	Description

[Portal]	The name of the portal: • Administrator Portal • Teacher Portal • Guardian Portal • Student Portal
Schools	For detailed information, see *Configure School Access*. **Note:** This setting controls only the display of links associated to a plugin. This does not restrict users from accessing content referred to by these links. Only the display of links based on the user's school context is affected.
Displayed in # / # Schools	Indicates the number of school the link displays in. **Note:** Only displays for Teacher Portal.
URL	The URL of the link, including <HostName>:<Port><Path>.
Display Text	The link title text appears.
UI Location	The location(s) where the link appears in the PowerSchool user interface.
SSO	Indicates whether or not the link is used for SSO.

Configure School Access

When a plugin is installed, by default all schools are granted access to the plugin links. Using the Link Display by School drawer, you can control which schools can view installed plugin links.

Note: Third party links appear in PowerSchool based on the navigation links defined in the plugin configuration file.

Note: This procedure is not applicable to plugins that handle their own school level access.

Note: School-level permissions within PowerTeacher Pro 1.0 will use the permissions of the school from which PTP was launched.

How to Configure School Access

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Click **Link Details**. The Link Details page for the selected plugin appears.
6. Click **Schools** next to the portal for which you want to configure school access. The Link Display by School drawer opens.
7. Use the following table to enter information:

Field	Description
Schools Where Links Not Displayed	Schools that have not been granted access to the plugin appear. To grant access to a plugin, highlight one or more schools in the list and click the arrow (>). The selected school appears in the Schools with access to plugin column. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. To grant access to a plugin for all schools, click the double arrow (>>). All schools appear in the Schools with access to plugin column.
Schools Where Links Displayed	Schools that have been granted access to the plugin appear. To revoke access to a plugin, highlight one or more schools in the list and click the arrow (<). The selected school appears in the Schools without access to plugin column. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. To revoke access to a plugin for all schools, click the double arrow (<<). All schools appear in the Schools without access to plugin column.

8. Click **Submit**. The Link Display by School drawer closes, and a confirmation message appears.

View OAuth Client Credentials

PowerSchool uses OAuth 2.0 to secure the data exchange features of a plugin. If you have installed a plugin that uses data exchange, PowerSchool auto-generates the plugin's client credentials. The client credentials are required for the external system to retrieve an access token for data exchange. This is sensitive data and should be kept secure to prevent unauthorized access to PowerSchool data.

PowerSchool is capable of sending the client credentials to the external system automatically if the publisher of the plugin has set up the system to handle automatic registration. If a plugin does not support automatic registration, then it will be necessary for you to manually send the client credentials to the publisher before the external system will be able to use the data exchange features.

Note: This procedure is only applicable if the plugin configuration file you installed includes OAuth configuration information.

How to View OAuth Client Credentials

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Click **Data Configuration**. The Data Configuration page for the selected plugin appears.
6. Use the following table to view information on the OAuth Credentials section:

Field	Description
Client ID	A value that uniquely identifies the plugin.
Client Secret	The account identifier associating the API client record to the client credentials.

7. Click **OK**. The Setup page for the selected plugin appears.

Configure Page Size

Using the Page Size Configuration settings, you can decrease or increase the number of records that can be requested per page.

Note: For more information, see the *PowerSchool Developer Site* available on PowerSource.

How to Configure Page Size

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to configure. The Setup page for the selected plugin appears.
5. Click **Data Configuration**. The Data Configuration page for the selected plugin appears.
6. Use the following table to enter information on the Page Size Configuration section:

Field	Description
Maximum Page Size	Enter the maximum number of records that can display on a page. **Note:** A value of 1 to 1000 may be entered. Increasing the maximum number of records that can display on a page could negatively impact system performance.

7. Click **Submit**. A confirmation message appears.

Enable Plugins

By default, the newly installed plugin is not enabled. Once the plugin is enabled, plugin functionality appears throughout PowerSchool.

How to Enable a Plugin

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Select the **Enable/Disable** checkbox of the plugin you want to enable. The Enable Plugin drawer appears.
5. Review the content.

   Note: If PowerSchool encounters errors with the plugin, detailed information about the errors appears and you may not proceed with enabling the plugin.

6. Click **Enable** to proceed. A confirmation message appears.

   Note: Once a plugin is enabled, third party links appear in PowerSchool based on the navigation links defined in the plugin configuration file.

   Note: If you have installed a plugin that is dependent on page customizations, you must enable page customizations on the Customizations page. For more information, see *Customizations*.

Update Plugin Version

Once you have installed and configured a plugin, you can later update it with a newer version. Updating may be done without having to delete and reinstall the existing plugin.

How to Update a Plugin Version

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the name of the plugin you want to update. The Setup page for the selected plugin appears.
5. Click **Update**. The Plugin Update page appears.
6. Do one of the following:
   - Click **Choose File** to select a new plugin version to install.
   - Click **Browse...** to browse for a new plugin version.
7. Click **Submit**. Depending on the file you selected, a message may display.
8. Use the following table to proceed:

Message	Action
The version number of this plugin is a less-recent version than the currently installed plugin. Are you sure you want to update the existing plugin with this version?	1. Select the new plugin version to install. 2. Click **Submit**.
The identifier for this plugin does not match the identifier of the currently installed plugin. In order to successfully update the currently installed plugin, the new plugin must have a matching plugin identifier.	1. Select the new plugin version to install that has a matching plugin identifier. 2. Click **Submit**.
The plugin name or publisher of this plugin does not match the plugin name or publisher of the currently installed plugin. In order to successfully update the currently installed plugin, the new plugin must have a matching plugin name and publisher.	1. Select the new plugin version to install that has the same plugin name or publisher. 2. Click **Submit**.

After clicking **Submi**t, the Enable Plugin drawer may appear (for some plugins).

9. Review the content.
10. Click **Enable** to proceed. A confirmation message appears.

    Note: If the newer version of your plugin includes page customizations, you must enable page customizations on the Customizations page. For more information, see *Customizations*.

Disable Plugins

Once you have enabled a plugin, it may become necessary to disable it. If a plugin is disabled, plugin functionality no longer appears throughout PowerSchool.

How to Disable a Plugin

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Deselect the **Enable/Disable** checkbox of the plugin you want to disable. The Disable Plugin pop-up appears.
5. Click **Yes**. A confirmation message appears.

Delete Plugins

Once you have installed and configured a plugin, you may find it necessary to remove it. If a plugin is deleted, the plugin is removed from the PowerSchool database altogether.

Note: Deleting a plugin will allow you to re-install it. You may delete and reinstall a plugin if you ever need to revert to the original settings.

How to Delete a Plugin

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Delete** next to the plugin you want to delete. The Delete Plugin pop-up appears.
5. Click **Yes**. The plugin no longer appears.

User Access

Configure User Access Roles

If an installed plugin includes teacher and admin SAML authorization, you can use the Roles Administration pages to control the level of access given to PowerSchool users who access plugin links from within PowerSchool and PowerTeacher. For more information, see *Roles Administration*.

Note: This procedure is only applicable if the plugin you installed includes SAML authorization and declares permissions.

Assign User Access Roles

Once you have configured user access roles for a plugin that includes teacher and admin SAML authorization, staff members must then be assigned the appropriate role(s) in order to access plugins from within PowerSchool and PowerTeacher. For more information on assigning a role to a staff member, see *Role Assignments*.

Note: When assigning user access roles to individual staff members, user access roles may be assigned to schools within PowerSchool, as well as to "external systems school" that represents external systems within PowerSchool. User access roles assigned to the external systems school do not grant access to any PowerSchool school or district regardless of the PowerSchool security group.

Mass Assign User Access Roles

The Mass Assign Use Access Roles function is also available when there is a SAML plugin that declares permissions. For more information on assigning roles to multiple staff members, see *Mass Assign User Access Roles to Selected Group of Users*.

Note: When mass assigning user access roles to selected staff members, user access roles may only be assigned to the "external systems school" that represents external systems within PowerSchool. User access roles assigned to the external systems school do not grant access to any PowerSchool school or district regardless of the PowerSchool security group.

Security

Monitor Activity

To ensure system security, you can monitor invalid access attempts to your API services. If a client attempts to obtain an API access token using invalid (expired or non-existent) client credentials or access token, a message is logged in the PSJ runtime log.

How to Monitor Activity

Use the PowerSchool Monitor to monitor the PSJ runtime log. For more information, see *How to View PSJ Runtime Log*.

Reset Client Credentials

If API services credentials have been compromised or you suspect they have been compromised, you can use this procedure to reset the API services credentials.

How to Delete a Plugin

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Delete** next to the plugin for which you want to reset the OAuth credentials. The Delete Plugin pop-up appears.
5. Click **Yes**. The plugin no longer appears.

How to Reinstall a Plugin

1. On the Plugin Management Dashboard page, click **Install**. The Plugin Install page appears.
2. For the **Plugin Installation File**, enter or select the plugin installation file.
3. Click **Install**. A confirmation message appears.

How to Reenable a Plugin

1. On the Plugin Management Dashboard page, select the **Enable/Disable** checkbox of the plugin you want to enable. A confirmation message appears.
2. Click **Yes**.

Working With Plugin Links

Once a plugin is set up, users can launch the plugin from within PowerSchool while keeping their PowerSchool session active allowing them to work in both applications simultaneously.

Note: The link only appears if the link is defined in the plugin configuration file, the plugin is enabled, the link is set to display for the selected school, and if you belong to a user access role that has the capability associated to the link.

Note: If SAML single sign-on settings have been added to PowerSchool as part of the plugin installation, SAML single sign-on links will only appear in PowerSchool and PowerTeacher if: A user is of the user type the link is specified for, and there are no permissions declared in that plugin; There are permissions declared in that plugin, and one or more of the permissions declared in that plugin is turned on for one or more of the user access roles that are assigned to that user.

Launch a Plugin Application

Use this procedure to launch a plugin application in PowerSchool, the PowerSchool Student and Parent portal, or PowerTeacher.

How to Launch a Plugin Application from the Navigation Bar

1. Do one of the following:
    - Sign in to PowerSchool.
    - Sign in to the PowerSchool Student and Parent portal.
    - Sign in to PowerTeacher.

    Note: For more information about signing in to PowerSchool, see *The Basics User Guide* available on PowerSource. For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Portal User Guide* available on PowerSource. For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. Click the **Applications** button (an upward-right arrow) in the navigation toolbar. The Applications drawer slides into view.
3. Click the **Application** link you want to launch. The application launches in a separate window (or tab depending on your browser settings).

Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

4. When you are finished working in the application, be sure to sign out of the application.
5. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

How to Launch a Plugin Application from the Main Menu

1. Do one of the following:
   - Sign in to PowerSchool.
   - Sign in to the PowerSchool Student and Parent portal.
   - Sign in to PowerTeacher.

   Note: For more information about signing in to PowerSchool, see *The Basics User Guide* available on PowerSource. For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Parent Portal User Guide* available on PowerSource. For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. In the main menu on the left side of the page, choose the plugin you want to launch. The application launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

3. When you are finished working in the application, be sure to sign out of the application.
4. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

PowerLunch User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerLunch is the lunch management portion of PowerSchool. The system helps you monitor meals sold, including free and reduced lunches, as well as student account balances and transactions.

PowerLunch is compatible with a wide selection of bar code and magnetic-strip readers. If your school is properly equipped, students can use their lunch IDs to have their accounts automatically debited as they pass through the lunch line. A full array of reports is available, including meal count reports and transaction reports.

Note: You are encouraged to read the section *Introduction to PowerSchool* if you have not already done so. In addition, the section *Custom Reports* will be helpful for creating and running reports in PowerLunch.

Meal Classifications

PowerLunch classifies cafeteria patrons into several categories. This helps schools maintain records on how many meals are sold. PowerLunch meal classifications include two main groups of patrons: students and adults.

Additionally, use the classifications to prepare reports for government funding. It is important to understand each category before you can set up PowerLunch for your school.

Students

Most people that eat lunch at school are students. They are divided into six groups based on the amount each pays for meals:

- **Free**: These students have qualified for the free lunch program and are not charged for meals. This is based on the financial situation of the students' families.
- **Reduced**: These students have qualified for a reduced price for meals. This is based on the financial situation of the students' families.
- **Full Pay**: These students pay the full, standard price for meals.
- **Exempt**: These students do not pay for their lunch because of special programs set up by the school. Some schools exempt students because they periodically work in the cafeteria in exchange for lunch. Others allow it because the student has participated in another program that benefits the school in some way. If a school does have such a program, students are usually exempt for specific days only. Generally, students are not exempt from paying for lunch every day. If a student is exempt, the government does not subsidize that lunch. It is important to understand that exempt students are not the same as those who receive free lunches. Whether a student receives free lunches or not depends on the family's financial situation. Students who are exempt from paying for lunch are designated as such because they participate in a school program that allows for it. If a student is exempt, the government does not subsidize that lunch, whereas a free lunch is subsidized.
- **Free-Direct Certification**: These students do not each lunch and are not counted in the eligibility counts for PowerLunch reports.
- **Temporary**: These students visit the school and receive lunch there.

Adults

While most meals are served to students, some are served to adults. There are three classifications for adult patrons:

- **Staff**: Staff work at the school or in the school district. Staff members include teachers, administrators, counselors, custodial staff, and maintenance workers.
- **Guest**: These adult patrons do not work at the school. Visitors such as parents and on-site PowerSchool trainers are guests.
- **Earned**: These adults have earned a free meal by working at the school. Some schools offer this type of program to those who work in the cafeteria or other part of the school. This classification is the equivalent of the exempt status for students.

Get Started

To get started with PowerLunch, you must first sign in to PowerSchool.

Sign In to PowerSchool

Because PowerSchool is a secure system, you need a secure connection to use it. To access PowerSchool, you must first sign in to the system. For more information, see *Sign In to PowerSchool*.

Note: Do not use your colleague's password or give your password to a colleague. Security is very important in PowerSchool. For more information, see *Security*.

How to Sign In to PowerSchool

1. Open your Web browser to your school's PowerSchool URL. The Administrator Sign In page appears.
2. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view PowerSchool from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters display as asterisks (*****) to ensure greater security when you sign in.
[Server Information]	The date, time, and version number appear. Click the version number to view the Server Details pop-up. When you are done viewing, click the **x** in the upper-right-hand corner to close.

3. Click **Sign In**. The start page appears. For more information, see *PowerSchool Start Page*.

Notes:

- If your PowerSchool administrator has issued you a temporary password, you may be asked to reset your password upon first signing in. For more information, see *How to Reset Your Password*.
- If your password has expired, you may be asked to reset your password. For more information, see *How to Reset Your Password*.
- If you have exceeded the number of sign in attempts allowed, you may become locked out of PowerSchool. If so, contact your PowerSchool administrator.

Access PowerLunch

On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.

Sign Out of PowerSchool

When you finish your work in PowerLunch, it is important to sign out. Sign out of PowerSchool from any page in the system. Click **Sign Out** in the header. The Administrator Sign In page appears. You must enter your username and password again to redisplay the start page.

Setup

At most schools, the PowerSchool administrator sets up PowerLunch with the input of cafeteria staff. If you are responsible for setting up PowerLunch, follow the instructions in the sections *PowerLunch Initialization* and *Free and Reduced Lunches*. When the setup is complete, proceed to the section *Lunch ID Numbers*.

You are encouraged to set a bookmark for the PowerLunch page on your computer's Web browser. This will save time when you want to sign in to PowerLunch.

PowerLunch Initialization

To initialize PowerLunch, begin by setting up the following items:

- *Set Prices*
- *Set Messages*
- *Create Student Lunch ID Numbers*
- *Create Lunch ID Numbers for Staff*
- *Publish Lunch ID Numbers*
- *Set Up Beginning Student Balances*
- *Set Up Beginning Staff Balances*

Set Prices

Set up a price list for the different categories of patrons at your school. Each category pays a different price for meals depending on their role at your school and their financial situation.

How to Set Prices

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Set Prices and Options** under Management. The Set Prices and Options page appears.
3. Use the following table to enter information in the fields:

Field	Description
Patron Type	The categories of patrons.

Breakfast Prices	Enter the price of breakfast for all categories of patrons. It is not necessary to enter a dollar sign, but you must use a decimal point. You cannot edit the Student Free Price field because students with a Free status do not have to pay for their first meal.
Second Breakfast Prices	Enter the price of breakfast for all categories of patrons. You can charge patrons receiving free or reduced meals the full meal price in Quicksale mode when they purchase a second meal. Additionally, this will put these second meals under the paid heading on the Meal Count Listing report. It is not necessary to enter a dollar sign when entering the price.
Lunch Prices	Enter the price of lunch for all categories of patrons. It is not necessary to enter a dollar sign when entering the price. You cannot edit the Student Free Price field because students with a Free status do not have to pay for their first meal.
Second Lunch Prices	Enter the price of lunch for all categories of patrons. You can charge patrons receiving free or reduced meals the full meal price in Quicksale mode when they purchase a second meal. Additionally, this will put these second meals under the paid heading on the Meal Count Listing report. It is not necessary to enter a dollar sign when entering the price.
Auto-calculate cash if the account is deficit	Select the checkbox to automatically calculate cash if the patron's account does not have enough of a balance to cover the meal (optional).
Use single-screen lunch process (Quicksale)	Select the checkbox to have the lunch process (Quicksale) display and to set a full-priced meal as the default. This step is optional, but you are encouraged to use it. For more information about Quicksale, see *Daily Activities*.
Show student photo on screen	Select the checkbox to display the patron's photo on the page (optional). This option is only available if student photos have been imported into PowerSchool.

Don't use false balance for free lunch students	Select the checkbox if you do not use false balances for free lunch students. This allows the student's free or reduced lunch price to appear on the page. This also allows low-balance messages to appear. Selecting the checkbox can create confidentiality issues if others view the page.
Allow students from any school through the lunch line	Select the checkbox to allow students from any school through the lunch line (optional). Often, this refers to other students in your school district. This affects all schools on your PowerSchool system.
Disable student allergy alert	By default, the student allergy alert is enabled. If a student has an allergy, an alert appears on the Record Lunch Sale page. Select the checkbox to disable of the student allergy alert. Alternatively, deselect the checkbox to re-enable the student allergy alert.

4. Click **Submit**. The Changes Recorded page appears.

Set Messages

Set up warning messages that appear when a student's account balance gets low or becomes deficit. Also, set up a message to tell the cashier if a student is eating a second meal for the day. If you do not want a message for a specific event, leave that field blank when setting up messages.

How to Set Messages

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Set Messages** under Management. The Set Messages page appears.
3. Use the following table to enter information in the fields:

Field	Description

When account balance drops below this level…	Enter the dollar amount of the cut-off to display a message when the patron's account balance drops below this level. This selection applies to your school only.
…display this message	If you entered a dollar amount in the previous field, enter the message to appear on the page when the student's balance is low.
When there is not enough money in the account, display this message…	To be warned when there is not enough money in the patron's account to pay for the meal, enter the message to appear on the page. This selection applies to all schools on your PowerSchool system.
When patron is purchasing a 2nd meal, display this message…	To be warned when a patron is purchasing a second meal for the day, enter the message to appear on the page. This is especially important when the student purchasing the extra meal receives free or reduced lunches. This selection applies to all schools on your PowerSchool system.

4. Click **Submit**. The Changes Recorded page appears.

Create Student Lunch ID Numbers

Assign numbers to a group of students or to an individual student. Lunch ID numbers may or may not be the same numbers as the student ID numbers. They are linked to the price that students pay for their meals and are used to keep track of students' meal account balances. PowerSchool administrators can assign lunch IDs at some schools.

How to Create Student Lunch ID Numbers

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **ID/Password Assignments**. The Assign IDs & Passwords page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
For	Select the option to indicate for whom you want to assign ID numbers. Do one of the following: • Select all of the enrolled students in the current school • Select the current selection of students • Select a single student
Don't overwrite any existing IDs or passwords	Select the checkbox if you do not want to overwrite any IDs or passwords already assigned in PowerSchool.
In case of conflicts append	If there is a conflict with an existing ID, choose a suffix from the pop-up menu.
Assign Lunch IDs	Select the checkbox to create only lunch IDs. Though options to create other IDs/Passwords appear on this page, ensure that no other checkbox is selected unintentionally, such as the Assign Web IDs and passwords checkbox.
Each Lunch ID is	Choose the number of digits in the lunch IDs from the pop-up menu. Choose how the number will be generated from the pop-up menu.

5. Click **Submit**. A notice appears, indicating that the students are being processed.

Create Lunch ID Numbers for Staff

To assign lunch IDs to staff, you must assign them one at a time by going through the Staff page: select the teacher, click **Edit Information**, enter the lunch ID, and click **Submit**. This works well for an individual teacher, but sometimes you want to export a list of several teachers, such as during the PowerSchool setup. When you export the staff list to your spreadsheet application, it will be easier to assign lunch ID numbers to each teacher and import that list back into PowerSchool.

Set Up Beginning Student Balances

Once everything else is set up and everyone has a lunch ID, you can start collecting lunch money. Most schools that use PowerSchool allow students to deposit money into their accounts so that they do not have to pay cash every day. This is advantageous for the schools because there are minimal cash transactions. The following instructions explain how to enter the first deposit into an individual student's account and subsequent deposits outside of those occurring as students pass through the lunch line. For instructions on how to handle deposits at the lunch line, see *Daily Activities* and *Maintenance Activities*.

Note: If you are setting up PowerLunch or if you are entering the beginning balance for several students, you can enter the data in a spreadsheet application and import it to PowerSchool. Contact your PowerSchool administrator for more information.

Repeat this procedure for all students when they make their initial deposit into their meal accounts and subsequent deposits that do not occur while passing through the lunch line.

How to Set Up Beginning Student Balances

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Choose **Lunch Transactions** under Administration in the student pages menu. The Lunch Transactions page appears.
3. Click **New**. The Transaction Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the transaction.
Description	Enter a description for the transaction, such as **Beginning Balance** or **Initial Deposit**.
Amount of Fee	It is not necessary to enter an amount in this field since a deposit is being made.
Amount of Credit	Enter the amount of the deposit.

Cash Transaction	Select the checkbox if the transaction is a cash transaction.

5. Click **Submit**. The Changes Recorded page appears.

   Note: Click **Lunch Transactions** to display the transaction. The balance updates to reflect the deposit.

Set Up Beginning Staff Balances

Enter the first deposit into an individual staff member's account and subsequent deposits outside of those occurring as they pass through the lunch line.

Note: If you are setting up PowerLunch or if you are entering the beginning balance for several staff members, you can enter the data in a spreadsheet application and import it to PowerSchool. Contact your PowerSchool administrator for more information.

How to Set Up Beginning Staff Balances

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Transactions** under Function in the staff pages menu. The Transactions page appears.
3. Click **New**. The Transaction Record page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Date of Transaction	Enter the date of the transaction.
Description	Enter a description for the transaction, such as **Beginning Balance** or **Initial Deposit**.
Debit	It is not necessary to enter an amount in this field since a deposit is being made.
Credit	Enter the amount of the deposit.

5. Click **Submit**. The Transactions page appears.

Free and Reduced Lunches

Once PowerLunch Initialization setup is complete, you can then begin set up PowerLunch to serve free and reduced lunches. The first two procedures, *How to Set Eligibility Levels* and *How to Create Eligibility Letter Templates*, must be done before you can start using PowerLunch. This may or may not be the responsibility of your PowerSchool administrator. School administrators should see *How to Evaluate an Application* for information about evaluating applications every time they receive an application for free or reduced lunches.

Set Eligibility Levels

For students to receive free or reduced-price lunches, you must set the cut-off amounts for each type of lunch. Additionally, you must set how much money a family can earn to be eligible for each type of lunch. The number of people in a household is also a part of the calculation. The state issues the values for these cut-offs that you enter into PowerLunch.

Repeat this procedure for each household size indicated by your state's directives.

How to Set Eligibility Levels

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Meal Program Eligibility** under Management. The Meal Program Eligibility page appears.
3. Click **Set Eligibility Levels**. The Eligibility Levels page appears.
4. Click **New**. The Edit Eligibility Level page appears.
5. Use the following table to enter information in the fields:

Field	Description
Household Size	Enter the number of household members identified for this meal program.
Max monthly income that qualifies for Free meals for this household size	Enter the maximum monthly income that qualifies a student for free meals for the specified household size.

Max monthly income that qualifies for Reduced meals for this household size	Enter the maximum monthly income that qualifies a student for reduced meals for the specified household size.

6. Click **Submit**. The Eligibility Levels page appears.

Create Eligibility Letter Templates

When a student applies for a free or reduced lunch, you must inform the parents or guardians of the results of the evaluation. To do this, PowerLunch generates letters. Generating such a letter is discussed in the section *How to Evaluate an Application*, but the following instructions explain how to set up the template for the letter.

To evaluate an application for free or reduced lunches, see *How to Evaluate an Application*. For more information about serving meals, see *Daily Activities*.

How to Create Eligibility Letter Templates

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Meal Program Eligibility** under Management. The Meal Program Eligibility page appears.
3. Click **Free**. The Free Letter page appears.
4. Enter text for the letter to appear when a student is approved as free. In addition to standard text, you can include HTML tags and PowerSchool data codes.
5. Click **Submit**. The Changes Recorded page appears.
6. Repeat these steps for the other two types of letters: Reduced Lunches and Not Eligible.

   Note: To make your work quicker, copy the text and codes from the Free Lunch letter, and paste them into body of the remaining letters. Then simply edit the text or codes to make them fit in the new letters.

Evaluate an Application

Evaluate a student's application for free or reduced lunches.

The default status for all students is Full Pay. An evaluation resulting in free or reduced lunches changes the status accordingly, and PowerLunch records the free or reduced lunch price in the appropriate student record. When the student passes through the lunch line, either the amount for a reduced lunch is charged to the student's account or there is no charge if the student receives free lunches. All lunches (full pay, reduced, free, and earned) are recorded for reporting purposes.

How to Evaluate an Application

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Meal Program Eligibility** under Management. The Meal Program Eligibility page appears.
3. Enter the last names of the students to be evaluated. Separate multiple names with semicolons.
4. Enter the application number, if applicable.
5. Click **Submit**. The Evaluate a Student page appears.
6. Use the following table to enter information in the fields:

Field	Description
Select each student to whom this evaluation will apply	Select the checkboxes to choose each student to whom this evaluation will apply, even if only one student is listed.
Household size	Enter the size of the student's or students' household.
Monthly income	Enter the monthly income of the student's or students' household.
Guardian name and address	Enter the name and address of the student's or students' guardian, as displayed on the eligibility letter.
Options	Select the standard evaluation option if you just want to verify a student's eligibility. Select the direct certification option to qualify the student by overriding the minimum monthly income requirements.

7. Click **Submit**. The results of the evaluation appear using the appropriate eligibility letter template. For more information, see *How to Create Eligibility Letter Templates*.

Lunch ID Numbers

Once *PowerLunch Initialization* and *Free and Reduced Lunches* setup is complete, you can then publish lunch ID numbers.

Publish Lunch ID Numbers

Once you assign lunch ID numbers, you must tell each person what their number is. A popular method of doing this is to create mailing labels with the lunch ID and barcode printed on them. Some schools put the label on a card and laminate it. For more information about creating mailing labels, see *Mailing Labels*.

Work with PowerLunch

Daily Activities

Serving breakfast and lunch are usually the most frequently used functions in PowerLunch. They help you to serve meals and track how much each patron spends. The instructions for serving breakfast and lunch are identical. Use the Record Sale page to enter deposits toward lunch balances. For more information, see *How to Take Deposits*.

Perform a Quicksale

A Quicksale is the fastest way to record the sale of a meal because it uses minimal keystrokes. Quicksale automatically records the proper amount to be charged to the patron's account, based on the meal prices assigned to their lunch ID numbers. The following instructions assume that you selected the Quicksale option when you set up prices. For more information, see *How to Set Prices*. These instructions apply to both students and staff.

How to Perform a Quicksale

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click either **Serve Breakfast** or **Serve Lunch** under Transactions, depending on which meal is being served. The Record Sale page appears.
3. Use the following table to enter information in the fields:

Field	Description
Lunch ID	Enter the patron's lunch ID number. This can be a student or a staff member.
Quicksale	Select the checkbox.

4. Click **Submit** to enter the sale. The transaction is recorded. The amount of the sale is automatically deducted from the patron's account.

   Note: If enabled, an allergy alert appears if the student has an allergy. For more information, see *How to Set Prices and Options*.

Note: If set up, a warning message appears when a student's account balance gets low or becomes deficit. For more information, see *How to Set Messages*.

PowerLunch is ready for the next patron's ID number.

Perform a Non-Quicksale

The Quicksale option is very handy when a student purchases a standard meal, but what if someone buys an item à la carte? These instructions apply to both students and staff.

How to Perform a Non-Quicksale

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click either **Serve Breakfast** or **Serve Lunch** under Transactions, depending on which meal is being served. The Record Sale page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Lunch ID	Enter the patron's lunch ID number. This can be a student or a staff member.
Quicksale	Deselect the checkbox.

4. Click **Submit**. The Record Sale page appears.

   Note: When navigating to this page, the cursor first appears in the **Cash Received** field.

5. Use the following table to enter information in the fields:

Field	**Description**
Lunch ID	The lunch ID for the selected patron appears.
Current Account Balance	The patron's current balance appears.

Charge One Meal	If you want to charge one meal, select the checkbox and enter the dollar amount charged, if different than the default amount. **Note:** If the default meal price does not appear in the Charge One Meal field, your system is configured to suppress the price of the meal on this page.
A La Carte Items	Enter the dollar amount of any à la carte items purchased.
Cash Received	Enter the dollar amount of any cash received.

Note: Click **Don't Record Sale** if you make an error in your entries. You return to the previous page.

6. Click **Record Sale**. The Record Sale page appears. The sale is recorded, and the amount of the purchase is subtracted from the patron's account.

   Note: If enabled, an allergy alert appears if the student has an allergy. For more information, see *How to Set Prices and Options*.

   Note: If set up, a warning message appears when a student's account balance gets low or becomes deficit. For more information, see *How to Set Messages*.

   PowerLunch is ready for the next patron’s ID number.

Perform a Student Guest Sale

Students from other schools can visit your school and have lunch during the day. In that case, you must record the sale, but it must appear as a different type in the records.

How to Perform a Student Guest Sale

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click either **Serve Breakfast** or **Serve Lunch** under Transactions, depending on which meal is being served. The Record Sale page appears.
3. Click **Student Guest**. The Record Sale: Student Guest page appears.

   Note: When navigating to this page, the cursor first appears in the **Cash Received** field.

4. Use the following table to enter information in the fields:

Field	Description
Lunch ID	The lunch ID for the selected patron appears.
Current Account Balance	The patron's current balance appears.
Charge One Meal	If you want to charge one meal, select the checkbox and enter the dollar amount charged, if different than the default amount. **Note:** If the default meal price does not appear in the Charge One Meal field, your system is configured to suppress the price of the meal on this page.
A La Carte Items	Enter the dollar amount of any à la carte items purchased.
Cash Received	Enter the dollar amount of any cash received.

Note: Click **Don't Record Sale** if you make an error in your entries. You return to the previous page.

5. Click **Record Sale**. The Record Sale page appears. The sale is recorded, and the amount of the purchase is subtracted from the patron's account.

   Note: If enabled, an allergy alert appears if the student has an allergy. For more information, see *How to Set Prices and Options*.

   Note: If set up, a warning message appears when a student's account balance gets low or becomes deficit. For more information, see *How to Set Messages*.

   PowerLunch is ready for the next patron's ID number.

Perform an Adult Guest Sale

There are times when adults visit your school and want to eat lunch there. You must record these sales as well.

How to Perform an Adult Guest Sale

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.

2. Click either **Serve Breakfast** or **Serve Lunch** under Transactions, depending on which meal is being served. The Record Sale page appears.
3. Click **Adult Guest**. The Record Sale: Student Guest page appears.

   Note: When navigating to this page, the cursor first appears in the **Cash Received** field.

4. Use the following table to enter information in the fields:

Field	**Description**
Lunch ID	The lunch ID for the selected patron appears.
Current Account Balance	The patron's current balance appears.
Charge One Meal	If you want to charge one meal, select the checkbox and enter the dollar amount charged, if different than the default amount. **Note:** If the default meal price does not appear in the Charge One Meal field, your system is configured to suppress the price of the meal on this page.
A La Carte Items	Enter the dollar amount of any à la carte items purchased.
Cash Received	Enter the dollar amount of any cash received.

Note: Click **Don’t Record Sale** if you make an error in your entries. You return to the previous page.

5. Click **Record Sale**. The Record Sale page appears. The sale is recorded, and the amount of the purchase is subtracted from the patron’s account.

   Note: If set up, a warning message appears when a student's account balance gets low or becomes deficit. For more information, see *How to Set Messages*.

   PowerLunch is ready for the next patron’s ID number.

Look Up a Teacher ID

Sometimes a staff member forgets his or her assigned lunch ID number. In this case, you must look it up because you cannot perform a transaction for a teacher without the number.

How to Look Up a Teacher ID

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click either **Serve Breakfast** or **Serve Lunch** under Transactions, depending on which meal is being served. The Record Sale page appears.
3. Click **Look up teacher ID**. The Search Staff page appears.
4. Search for and select the teacher. For more information, see *Staff Search*.
5. Click **Edit Information**. The Edit Information page appears.
6. Note the teacher's Lunch ID.

Review Recent Sales

If a patron approaches you saying that he or she was not given the correct change or that there was another problem concerning the sale, you can review the ten immediate previous sales.

How to Review Recent Sales

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click either **Serve Breakfast** or **Serve Lunch** under Transactions, depending on which meal is being served. The Record Sale page appears.
3. Click **Review Recent Sales (up to 10)**. The Review Sales page displays the names of the patrons, time of the sales, and amount of each sale.
4. Click the amount of the sale to view more details about it. The View Transaction page appears.
5. Do one of the following:
    - Click **Delete** to delete the transaction, if necessary. The Selection Deleted page appears.
    - Click **Back** to return to the Record Sale page.

      Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

Enter Earned Meals

Some schools offer meals in exchange for work performed at school. Either students or adults can earn meals, but they must be recorded as such for reporting purposes. This should be done each day that someone earns a meal.

How to Enter Earned Meals

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Enter Earned Meals** under Management. The Enter Earned Meals page appears.
3. Use the following table to enter information in the fields:

Field	Description
School	The selected school appears.
Which meal?	Choose the meal earned from the pop-up menu.
# of student earned meals	Enter the number of meals that students earned.
# of adult earned meals	Enter the number of meals that adults earned.
Date	Enter the date indicating when the meals were earned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

4. Click **Submit**. The meals are recorded, and you return to the PowerLunch start page.

Maintenance Activities

The activities described in this section are those that you may perform on a regular basis but perhaps not every day.

Take Deposits

Take deposits of money to be credited to an account after the initial deposit has been made. For more information about how credit the initial deposit, see *How to Set Up Beginning Student Balances* and *How to Set Up Beginning Staff Balances*.

When a patron pays for a single meal with cash, use the non-Quicksale transaction. For more information about this type of transaction, see *How to Perform a Non-Quicksale*.

How to Take Deposits

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Take Deposits**. The Record Sale page appears.
3. Use the following table to enter information in the fields:

Field	Description
Lunch ID	Enter the patron's lunch ID number. This can be a student or a staff member.
Quicksale	Deselect the checkbox.

4. Click **Submit**. The PowerLunch Deposit page appears.
5. Use the following table to enter information in the fields:

Field	Description
Lunch ID	The patron's lunch ID appears.
Current Acct Balance	The patron's account balance appears.
Amount Received	Enter the amount of the deposit.
Tender Type	Choose whether the patron paid by cash or check.
Status	The patron's lunch status:

	• **F**=Free • **R**=Reduced • **P**=Full Pay • **E**=Exempt • **FDC**=Free Direct Certification

6. Click **Submit**. The deposit is recorded.

   PowerLunch is ready for the next patron's ID number.

Issue Student Refunds

There are times when you have to issue a refund; maybe a student is leaving school with a meal account credit, or perhaps someone made an error on the student's account. Whatever the reason, record the transaction when you determine that a refund should be issued.

Note: Be sure to use the Lunch Transactions page and not the Fee Transactions page.

How to Issue Student Refunds

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Choose **Lunch Transactions** under Administration in the student pages menu. The Lunch Transactions page appears.
3. Click **New**. The Transaction Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the transaction.
Description	Enter a description for the transaction, such as **Refund for overcharge**.
Amount of Fee	It is not necessary to enter an amount in this field, since a refund is being made.

Amount of Credit	Enter the amount of the refund.
Tender Type	If appropriate, choose whether the refund was paid by cash or check.

5. Click **Submit**. The Changes Recorded page appears.

Issue Staff Refunds

There are times when you have to issue a refund, such as when an error is made on the staff member's account. Whatever the reason, record the transaction when you determine that a refund should be issued.

How to Issue Staff Refunds

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Transactions** under Functions in the staff pages menu. The Transactions page appears.
3. Click **New**. The Transaction Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Date of Transaction	Enter the date of the transaction.
Description	Enter a description for the transaction, such as **Refund for overcharge**.
Debit	It is not necessary to enter an amount in this field, since a refund is being made.
Credit	Enter the amount of the refund.

5. Click **Submit**. The Changes Recorded page appears.

Create a Deficit Account Letter

When a student's account balance is negative, you must notify the parents or guardians. This project involves several tasks. You must first create a form letter template, select the students whose accounts are deficit, and then run the report to generate the letters.

For instructions on exporting the template and importing it to your PowerSchool system, see *Report Templates*. In addition, the search string for selecting students with a deficit balance is **balance1<0**.

Manager Screen

Use the PowerLunch Manager Screen to perform PowerLunch activities that are outside of or more complex than the daily activities. All options on the Manager Screen concern changing data entered on days in the past.

Change Previous Meals

Change a patron's meal classification and edit previous transactions that might be affected by a change in classification. This is useful when a student is retroactively approved for free or reduced lunches.

How to Change Previous Meals

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Manager Screen** under Management. The Manager Screen appears.
3. Click **Change Previous Meals**. The Change Previous Meals page appears.
4. Use the following table to enter information in the fields:

Field	Description
Which students?	Select the option to indicate which students' classifications will change. For information about searching for and selecting students, see *Student Search*.
On/between these dates	Enter the first and last days of the date range to be changed using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

Change meals to this type	Choose the meal charge category from the pop-up menu: • **Free** • **Reduced** • **Full pay**

Note: The change you are about to make affects all meal transactions for the student, the account balance, and meal counts. Be sure you want to change the classification.

5. Click **Submit** if you are sure you want to change the classification. The Changes Recorded page appears.

Edit Transactions

Change individual transactions for a specific day.

How to Edit Transactions

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Manager Screen** under Management. The Manager Screen appears.
3. Click **Edit Transactions**. The Edit Transactions page appears.
4. Use the following table to enter information in the fields:

Field	Description
Date Range	Enter the first and last days to be scanned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
At this school	Choose the school from the pop-up menu.

5. Click **Submit**. The Select a Transaction to Edit page appears.
6. Click the transaction you want to edit. The Edit Transaction page appears.
7. Make any necessary changes to the transaction.
8. Click **Submit**. The Changes Recorded page appears.

How to Enter Meal Transactions for a Different Date

Use this option if you must manually record the day's sales.

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Manager Screen** under Management. The Manager Screen appears.
3. Click **Transaction for a Different Date**. The Transaction for a Different Date page appears.
4. Use the following table to enter information in the fields:

Field	Description
Date on which to enter transactions	Enter the date that will be used to record the transactions using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Which meal	Choose the meal from the pop-up menu.
School	The selected school appears.

5. Click **Proceed to Serving Screen**. The Record Sale page appears, and you can now enter the transactions as if they were occurring live.

   Note: When you finish entering the transactions for the different date, sign out of PowerLunch to reset the date.

Reports

PowerLunch's reporting functions are varied and useful. Run the reports regularly to manage your own records and to provide statistics to the state, if necessary. For the most part, they are simple to produce and user-friendly. However, you are encouraged to see the sections *Custom Reports* and *Preconfigured Reports* before trying to create reports.

Note: Click your Web browser's Back button anytime you get a report that does not provide you with the proper information. Whether you need another column or just selected the wrong reporting date, simply go back and reset your specifications.

Run the Cash Report

This report tells you how much cash each cashier accepted on a selected day.

How to Run the Cash Report

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Cash Report** under Reports. The Cash Report page appears.
3. Enter the date for which you want to produce the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
4. Click **Submit**. The resulting report displays which cashiers received deposits in cash and checks on the date you specified.

Run the Meal Count Listing Report

This report is similar to the Meal Count report but includes more details. You have the option of clicking links in the reported statistics to learn more about them.

How to Run the Meal Count Listing Report

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Meal Count Listing** under Reports. The Meal Count Listing page appears.
3. Use the following table to enter information in the fields:

Field	Description

Date Range	Enter the date range to be scanned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Meal	Choose the meal from the pop-up menu.
Use school calendar	Select the checkbox to use the school calendar when scanning. This function excludes any school holidays from the count.

4. Click **Submit**. The resulting report displays the number of eligible patrons in each category (the number in brackets) and how many meals were purchased by each category (the number to the left of the number in brackets).

   Click any of the linked numbers to view the details of the transactions that make up that number. For students, there are seven categories: free, reduced, paid, guest, exempt, earned, and additional. The seven categories are added in the total column. For adults, there are four categories: faculty, guest, earned, and additional. The four categories are added in the total column. Both totals are added in the last total column on the right. Totals for multiple days appear at the bottom of each column.

Run the Meal Count Report

This report provides a quick list of total meals served on the selected days. It displays the breakdown by meal and lunch status. The following rules apply to students on this report:

- The guest or earned meal must have been served at the current school in order to be included in the guest or earned meal count for the current school.
- A meal served at the current school for a student enrolled in another school in the district is included in the Meal counts for the current school but excluded from the Eligibility counts.
- The student must be enrolled at the current school (or within the district if running at the district level) on the eligibility count date. The eligibility section of the report only applies to the end date of the date range; students need to be enrolled on that date to be counted correctly on the report.

Note: Once the PowerSchool end-of-year process is complete, no historical meal counts, or eligibility counts can be reported for the preceding year.

You can run this report at the district level. If doing so, you must first switch schools to the district office. See *How to Change Schools*. Also, the students must be enrolled somewhere within the district during the specified date range.

If you run this report at the school level, the report scans pasts and present student enrollments in the current school for the date range entered.

How to Run the Meal Count Report

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Meal Count Report** under Reports. The Meal Count Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
Date Range	Enter the date range to be scanned using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If you do not enter a date, the current date is used as the date range. You can enter the same date in both fields to report on a single day.
Restrict report to these grade levels	Enter the lowest and highest in the range of grade levels to be scanned. If you want a report on one grade only, enter the same grade number in both fields. To scan all grades, leave both fields blank.

4. Click **Submit**. The report displays the number of meals served on the specified days.

Take PowerLunch Class Counts

This report helps you plan how many meals to prepare by importing counts from PowerTeacher.

Note: The count will only display meals for those teachers who submitted their lunch counts through PowerTeacher.

How to Take PowerLunch Class Counts

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **PowerLunch Class Counts** under Reports. The PowerLunch Class Counts page appears. The report displays today's date at the top of the page, as well as the number of hot meals and milk units students intend to purchase.

Run the Transaction Detail Report

This report provides detailed information about transactions in a selected date range. After you select the information to be scanned, PowerLunch produces a report in your spreadsheet application. You can select to retrieve almost any information from PowerLunch on any day.

How to Run the Transaction Detail Report

1. On the start page, choose **PowerLunch** under Applications in the main menu. The PowerLunch page appears.
2. Click **Transaction Detail Report** under Reports. The Transaction Detail Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
Columns to show	Select any combination of the checkboxes to indicate what to display.
Start Date	Enter the start date of the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
End Date	Enter the end date of the report using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Transaction Types	Select the checkbox next to the transaction type to display: • **All** (both staff and student lunches)

	• **Student Lunch** • **Staff Lunch**
Batch number	Enter a batch number to scan a specific batch. Separate multiple batches with commas. A batch refers to a cashier's session for the day. For example, if you have two cashiers for breakfast, the sessions are batch numbers 1 and 2. Perhaps you have four cashiers for lunch on the same day. They would be batch numbers 3-6. You can prepare a report on the activities of certain staff members.
Order	Choose from the pop-up menu the sort order of the listings on the report.
Export	Select the checkbox to export the report to a file that you can open with your spreadsheet application. If you do not select the checkbox, the report appears in your Web browser and you will not be able to format it.

4. Click **Submit**. If you did not select the Export option, the report appears, including the columns you selected and cash totals. Print or save the report. If you save the report without exporting it, you could lose some of the report's format. For more information, see *Run, Print, and Save Reports*.

   If you chose the Export option, continue to the next step to save the file.

5. Choose **File** > **Save As...**.
6. In the Save dialog, specify a name, location, and file type.
7. Click **Save**. Open the file using a spreadsheet or other application.

PowerScheduler Load Process User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

When to Load Only Student Schedules

Complete the PowerScheduler Load Process if you already have a master schedule and only need to load student schedules. It is relevant for schools that meet any of the following criteria:

- Built a master schedule manually
- Copied a previous year's master schedule
- Plan to copy a previous year's master schedule

The process of loading only student schedules includes preparing to load, loading, and committing schedules. This process assumes that you have entered student course requests but not done any other preparation for preparing to build a master schedule.

Because every situation is different, there is some flexibility as to which steps an individual school will need to perform. It is important to understand each step and know how to make adjustments when necessary. Do not perform a step if you are not sure that you should.

The load process includes the following steps:

Auto Scheduler Setup: Must be performed as the first step in the process. Use the Auto Scheduler Setup function to create a scheduling scenario. 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 each school uses PowerScheduler.

Set Schedule Year: Must be performed as the second step in the process. Use the Set Schedule Year function to associate your scenario with the Years & Terms created using the Auto Scheduler Setup.

Copy Master Schedule: Must be performed as the third step in the process. Use the Copy Master Schedule function to copy the schedule from a previous school year. This function copies sections into the schedule, including all associated settings, such as expression, room, teacher, and term.

Parameters: The following required parameters are set up when using Auto Scheduler Setup: Catalogs, Days, Periods, and Years & Terms.

Load Constraints: Define load constraints, if appropriate.

New Courses: After creating courses, associate them to the course catalog on the live-side, then associate the courses to catalog in PowerScheduler.

Rooms: Create the appropriate rooms for the schedule. Rooms are associated with sections when copying the master schedule. However, you may still need to create them for the current scenario. The master schedule and rooms are directly related; if rooms are not valid, sections will not display in the master schedule.

Teacher Scheduling Preferences: Populate the required teacher scheduling fields, which are Schedule This Teacher and Maximum Consecutive Periods.

Student Scheduling Preferences: Populate the required student scheduling fields, which are Next School, Next Year Grade, and Schedule This Student.

Course Requests: It is necessary to setup new courses and student scheduling preferences before entering student course requests. Student course requests must be entered before loading.

Review Master Schedule: Review the Master Schedule and make any final manual modifications.

Load Validation: Once the schedule is complete and students have entered requests, validate the load. When validating, the PowerScheduler engine performs the load function without actually creating any student schedules. Review any errors or warnings in the Load Results Log.

Load: When a load validation does not return any errors, run a load.

Import Results: To view student schedules in PowerScheduler, it is necessary to import the results. If you are satisfied with the details in the Load Results Log, then import the results to transfer the data into PowerScheduler.

Reports: PowerScheduler includes a group of reports designed for analyzing data after loading.

Re-Load: If you need to make changes that affect student schedules, such as courses, sections, or load constraints, it is possible to run the load again. Re-loading changes all student schedules that were previously imported. To preserve changes, perform the reschedule process.

Manually Schedule: Though PowerScheduler strives to create ideal schedules, it may be necessary to make manual modifications. Re-loading after making manual modifications changes all student schedules. To preserve changes, perform the reschedule process.

Reschedule: To load schedules for a specific group of students, select the group of students and choose the **Reschedule the selected [x] students** option.

Commit the Schedule: Before committing the schedule, verify that there is a current backup of your PowerSchool data. Also, verify that the End-of-Year (EOY) process has not been performed. Then, commit the schedule for the next school year. It is possible to replace student schedules, sections, or both.

Load Process: Schedule Setup

When loading student schedules, you must first define the school year, terms, and days that school is in session. Then, create a build scenario into which you can copy an existing master schedule. Finally, verify that these setup procedures are performed correctly.

Note: It is strongly recommended that you use the Automatic Scheduler Setup function to create the scenario instead of manually defining years and terms.

If you did not build your own master schedule, you can copy an existing master schedule to use as the foundation for your new master schedule. For more information, see *Copy the Master Schedule*. To delete a master schedule, see *How to Delete the Master Schedule*.

How to Define a Schedule Year and Terms

For scheduling purposes, you need to define the upcoming school year and its associated terms. If you are working with a copy of a previous year's master schedule, the terms will remain the same as they were in that schedule.

Note: It is strongly recommended that you use the Automatic Scheduler Setup function to create the scenario instead of manually defining years and terms.

It is important to enter the terms sequentially. For example, first create the school year, then semesters, and finally quarters.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Years & Terms** from the PowerScheduler menu. The Schedule Years & Terms page appears.
3. Click **New**. The Create New Schedule School Year page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name of School Year	Enter the name of the school year, such as 2008-2009.
Abbreviation	Enter an abbreviation for the school year, such as 08-09.
First Day of School	Enter the first day of school for this academic year in MM/DD/YYYY format, such as 09/02/2009.

Last Day of School	Enter the last day of school for this academic year in MM/DD/YYYY format, such as 6/5/2010.

5. Click **Submit**. The Schedule Years & Terms page displays the schedule year.
6. Click **Edit Terms** in the row of the appropriate schedule year.
7. On the Term Setup page, click **New**. The Edit Schedule Term page appears.

   Note: Enter the terms sequentially. That is, if your school has terms of two semesters and four quarters, enter them in this order: Year, Semester 1, Semester 2, and then Quarter 1, Quarter 2, Quarter 3, and Quarter 4.

8. Use the following table to enter information in the fields:

Field	**Description**
Name of Term	Enter the name of this term, such as Semester 1.
Abbreviation	Enter an abbreviation for this term, starting with a letter, such as S1.
First Day of Term	Enter the first day of this term in MM/DD/YYYY format.
Last Day of Term	Enter the last day of this term in MM/DD/YYYY format.
What portion of the school year does this term represent?	Use the pop-up menu to choose the fraction that this term represents within the school year. If your school year consists of four terms, choose **1/2**. If this term represents the whole school year, choose **Full year**.
Import File Term #	Enter an import file term number so that the system can align terms when it imports the master schedule. For example, if your school uses semester and quarter classes, you might state in the import file that all sections of S1 are identified by the number S10203. Enter the same number in this field to map the date.

9. Click **Submit**. The Term Setup page appears.

How to Define Days

Define the number of days in the schedule. A day (or "cycle") is the number of repeating days that make up a schedule.

Note: A schedule day or cycle is NOT the same as a calendar day.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Days** from the PowerScheduler menu. The Edit Days page appears.
3. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the day.
Abbreviation	Enter an abbreviation for the day name.

4. Click **Submit**. The Changes Recorded page appears.

How to Create a Build Scenario

You need to create a build scenario. First, define the basic build information, such as the number of terms, days, and periods in your master schedule. Then, define load optimization parameters to determine the minimum and maximum number of possibilities the system evaluates while loading student schedules with courses.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Scenarios** from the PowerScheduler menu. The Scenarios page appears.
3. Click **New**. The Edit Build Scenario page appears.
4. Use the following table to enter information in the Build Information fields:

Field	Description

[Scenario type]	Select the **Load Only** option if you already have a schedule, such as through the process of either importing or copying, and only want to load students. **Note:** If creating a **Build and Load** scenario, see *Build Scenarios*.
Build Name	Enter a name for this build scenario. If you are creating several scenarios, use descriptive names so that you can easily distinguish among them.
Active Build	If you are creating only one build scenario, select the checkbox. If you are creating more than one build scenario, select the checkbox for the one you want the system to use to build your master schedule. **Note:** You will only be able to edit the course catalog that is associated with the build marked as active.
Build Description	Enter a description of this scenario.
Terms	1. Click **Associate** to select the number of schedule terms you want this scenario to include. The Schedule Term Setup page appears. 2. Select the checkboxes in the rows that represent the number of schedule terms you want this scenario to include. For example, if you plan to build a two-semester master schedule, select the checkbox next to the row that includes Semester 1 and Semester 2. 3. Click **Submit**.
Periods	From the pop-up menu, choose the number of periods per day for this build scenario. For example, if you are building a block schedule, you might choose 4. If you are building a regular schedule, you might choose 7.
Days	Choose from the pop-up menu the number of days for this build scenario.

Course Catalog	Use the pop-up menu to choose the course catalog you want the system to use to build this schedule. If this is your first time creating a master schedule, do not select a catalog. The system will automatically generate a course catalog, which you can modify. For more information, see *Course Catalogs*.

5. Use the following table to enter information in the Build Optimizations and Load Optimizations fields:

Field	**Description**
Percent of schedule combinations to evaluate for each course	Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. The default value of this field is 10. For example, if you enter **25**, the system evaluates one-quarter of the possible schedule combinations for each course. If you enter **75**, the system evaluates three-quarters of the possible schedule combinations for each course.
Minimum number of schedule combinations to evaluate for each course	Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. The default value of this field is 10,000. For courses with few possible combinations to begin with, use a higher number to prevent the system from attempting too few schedule combinations and not being able to fit the course into the schedule.
Percent of schedule combinations to evaluate for each student	Change this value only if you encounter problems with the amount of time the system is using to load the master schedule. The default value of this field is 10. For example, if you enter **25**, the system evaluates one-quarter of the possible schedule combinations for each student. If you enter **75**, the system evaluates three-quarters of the possible schedule combinations for each student.

Minimum number of schedule combinations to evaluate before skipping	Change this value only if you encounter problems with the amount of time the system is using to load the master schedule. The default value of this field is 10,000. Enter a high number to force the system to sample a minimum number of student schedule course possibilities.

Note: You can also set build optimizations for a particular course by adding a Course Optimize constraint. This type of constraint takes precedence over the build optimizations you set here. For more information, see *Build Constraints*.

6. Use the following table to enter information in the Best Schedule Weights fields:

Field	Description
Student conflicts	To have the system give more weight to student conflicts than section balance when confronted with a conflict while building the master schedule, enter a larger number in this field than in the Section balance field. The default value of this field is 50. **Note:** The numbers in both of these fields must add up to 100.
Section balance	To have the system give more weight to section balance than student conflicts when confronted with a conflict while building the master schedule, enter a larger number in this field than in the Student conflicts field. The default value of this field is 50. **Note:** The numbers in both of these fields must add up to 100.
Total	The total of the weighting values appears. This number must be 100.

7. Click **Submit**. The Scenarios page appears.

How to Verify Periods

After copying the master schedule, verify the periods for your schedule and verify the scenario.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Periods** from the PowerScheduler menu. The Periods page appears.
3. Verify that the period information is correct.

   Note: If you edit the information, click **Submit**.

How to Verify the Scenario

After you verify the accuracy of your master schedule, make sure that the details of the scenario you created are accurate.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Scenarios** from the PowerScheduler menu. The Scenarios page appears.
3. Click the name of the build scenario you want to use to build your master schedule. The Edit Build Scenario page appears.
4. Verify that the data in the following fields are correct: Build Name, Terms, Periods, Days, and Course Catalog. Make modifications, if necessary.
5. Click **Associate** next to the Terms field. The Schedule Term Setup page appears.
6. Select the checkboxes in the rows that represent the number of schedule terms you want this scenario to include. For example, if you plan to build a two-semester master schedule, select the checkbox in the row of Semester 1 and Semester 2.
7. Click **Submit**.
8. On the Edit Build Scenario page, enter comments in the Build Description field to describe this scenario.
9. Click **Submit** to save any changes. The Scenarios page appears.

How to Move a Course Section

You probably need to make minor changes to the master schedule you built or copied. For example, you might know from past experience that a particular course section should convene during a different period, or maybe a new teacher will replace one who is retiring.

Delete any courses that are not part of next year's master schedule or that you schedule manually, such as before- or after-school sections. Also, keep in mind that the loading process often runs smoother if you do not include teacher aid, work release, study hall, independent study, or preparation courses in your master schedule.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Sections** from the PowerScheduler menu. The sections menu appears.
3. Click the course for the section you want to move. The course information page appears.
4. Click the section number. The Edit Section page appears.
5. Use the following table to enter information in the specified fields:

Field	Description
Term	Choose from the pop-up menu the term in which this section meets.
Schedule	Select the checkboxes for the periods for the appropriate days on which this section is taught. This creates the schedule expression that appears next to the section on several pages. The expression must tell the scheduling engine exactly how to schedule the section. For example, your school has a two-day schedule that includes periods 1, 1A, and 1B. A course held during Period 1 meets both A day and B day. A course held during Period 1A meets first period on A day, and a course held during Period 1B meets first period on B day. In this scenario, you would select the A and B checkboxes in the Period 1 row.
Teacher	Choose a teacher from the pop-up menu.
Room	Enter the room name or number in which this section is taught.

6. Click **Submit**. The course information page appears.

Load Process: Course Information

Automatically generate information into fields on the Course Information page based on the current master schedule. Then, verify the information and set scheduling preferences for each course.

How to Auto Generate Course Information

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Auto Generate Course Information**. The Auto Generate Course Info page appears.
4. Select the checkbox to verify that you want to generate course information for the fields.
5. Click **Submit**. The Changes Recorded page appears.

How to Verify and Complete Course Information

If you use the auto-generate course information function, the system enters the following information for each course:

- Number of sections offered
- Valid terms
- Terms per year
- Periods per meeting
- Periods per cycle
- Frequency
- Is This Course a Lab
- Lab Periods per meeting
- Lab Frequency
- Maximum enrollment
- Schedule this course
- Build type
- Load priority
- Load type
- Balance priority

Verify and adjust these values. Then, enter course scheduling preferences for each course on the Course Information page.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

The Course Information page appears.

5. Select either the **Allow Student Repeats in the Same Term** or **Allow Student Repeats in Different Terms** checkbox.
6. Use the following table to adjust any values in the Load Options section of the page:

Field	Description
Load Priority	Enter a numerical value of 1 to 99 (1 being the highest priority) to prioritize in which course the system should schedule a student when a conflict between two of the student's requests arises. You can enter the same load priority number for several courses. For example, enter a load priority of **10** for all academic courses to ensure that students are loaded into these courses first, **20** for academic electives, and **30** for non-academic electives. **Note:** If this course has a Section Link constraint associated with it, you may want to give it the highest load priority to prevent the section link from being broken.
Load Type	Choose from the pop-up menu whether this is an academic, elective, or alternate course. The system uses this classification to balance the types of courses in which the student is scheduled during a schedule term. For example, if your school's scheduling terms are semesters, the system does not schedule the student in all elective courses the first semester and all academic courses the second semester.
Balance Priority	Use this pop-up menu to set a secondary priority for the course when loading student schedules. The primary priority is determined by the Load Priority field. The following settings create an additional priority. For example, if you choose Grade from the pop-up menu, the system not only attempts to keep an equal number of students in each section, but also an equal number from all grade levels. The default setting for loading students into the master schedule is Section. Use the pop-up menu to choose one of the following options to ensure a balance of students in each section (optional):

	• **Section:** When loading students into sections, the system always attempts to keep an even number of students among sections. • **Gender:** Balanced number of students by gender within each section. • **Grade:** Balanced number of students from each grade level within each section. • **EthnicCode:** Balanced number of students with different ethnic codes within each section. • **House:** Balanced number of members from each house within each section. **Note:** In order to balance by genders other than male and female, you will need to use the server-side engine loader (rather than the client-side scheduling engine), which optimizes processing for faster and better results.
Use Pre-Established Teams	Select the checkbox if you want the system to reference teams when scheduling students into this course.
Close Section After Max	Select the checkbox if you want the system to stop scheduling students in a section of this course after the enrollment reaches the number you defined in the Maximum Enrollment field.
Use Section Types	Select the checkbox if you want the system to schedule the course according to section types.

7. Click **Submit**. The Changes Recorded page appears.

Load Process: Prepare Staff and Students

Prepare staff and student records before loading the master schedule.

How to Prepare Staff

You must verify that you selected the Use for Scheduling checkbox for each teacher on the Staff Scheduling Preferences page in the active or "live" side of PowerSchool. You can use the Set Staff Field Value function to select the checkbox for all teachers at the same time.

1. On the start page, choose **Staff** under People in the main menu. The Search Staff page appears.
2. Select the group of staff members.
3. Click **Functions**. The Group Staff Functions page appears.
4. Click **Set Staff Field Value**. The Teacher Field Value page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Field to Change	Enter the name of the field to be changed. Enter **Sched_Scheduled** to prepare teachers for scheduling. **Note:** To view a list of field codes, click **Fields**.
New Field Value	Enter the new value of the field. Enter **true** to prepare teachers for scheduling. Put quotation marks around any values that do not perform calculations, such as constant characters or a string of characters.
Clear Field Value	Select the checkbox to remove existing values for that field.
Do not overwrite existing data	Select the checkbox if you do not want the system to overwrite any existing field values.

6. Click **Submit**. The Field Value page appears.
7. Click **Submit** to confirm. Now you can perform a search to find the group with the changed value.

How to Prepare Students

Confirm that the appropriate students are available in your database for scheduling. Before the system can load students into the master schedule, you must enter detailed scheduling information for each student.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.

3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
   - Choose **Preferences** from the pop-up menu.
   - Click the **Preferences** tab.

   The Edit Scheduling Preferences page appears.

6. Use the following table to enter information below the Required Settings header:

Field	**Description**
Next Year Grade	Enter the student's next year grade level.
Priority	Enter a number to indicate the order in which the system should schedule this student during the load process. You can assign scheduling priorities to students for the system to follow when loading student schedules. Students can share the same priority. For example, if there are more requests than available spots, you might want the system to schedule graduating seniors first because it is their last chance to take the courses they request. If this is the case, assign all twelfth graders a priority of **10**, all eleventh graders a priority of **20**, all tenth graders a priority of **30**, and all ninth graders a priority of **40**. **Note:** The lower the number, the higher the priority.
Schedule This Student	Select the checkbox to include the student in the scheduling process. If you forget to select the checkbox for a student who has made course requests, the system will be unable to schedule that student. Not only do you have to select to include the appropriate students, but also you must exclude graduating students by deselecting the checkbox.

Year of Graduation	Enter the student's year of graduation. **Note:** You do not have to enter a year of graduation for students who are graduating this year.
Next School Indicator	Choose the school the student will attend next year from the pop-up menu. Choose **Graduated School** for students who are graduating this year.

7. Click **Submit**.

Other Scheduling Functions

Use the links on the Scheduling Functions page to run processes related to the master schedule. For scheduling functions not listed in this section, see the following sections:

- *Calculate Target Number of Sections to Offer*
- *Duplicate Scenarios*
- Expression Mapping, used when *Importing the Master Schedule*
- *Update Selections*, including the processes *Unlock Previously Scheduled Courses*, *How to Set the Next Year Grade Field for an Entire Grade Level*, *How to Schedule All of Next Year's Students*, and *How to Assign a Group of Students to a Building, House, or Team*.

How to Auto Generate Course Information

Automatically generate information into the fields on the Course Information page based on the current master schedule.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Auto Generate Course Information**. The Auto Generate Course Info page appears.
4. Select the checkbox to set the following fields to their default values:
    - Load Priority: 10
    - Load Type: Academic
    - Balance Priority: Section
    - Schedule this Course: True

5. Click **Submit**. The Changes Recorded page appears.

How to Auto Generate Rooms

Automatically generate rooms from the existing master schedule to use in the new build.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Auto Generate Rooms**. The Generate Rooms page appears.
4. Select the checkbox to verify that you want to copy the existing rooms into the current build.
5. Click **Submit**. The Changes Recorded page appears.

How to Auto Generate Teacher Assignments

Automatically generate teacher assignments from the existing master schedule. To verify that these assignments display the correct terms, number of assignments, and other information, run the *Teacher Assignments by Teacher Report*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Auto Generate Teacher Assignments**. The Generate Teacher Assignments page appears.
4. Select the checkbox to generate teacher assignments using the existing master schedule.
5. Click **Submit**. The Changes Recorded page appears.

How to Calculate Percent Schedules

Percentage calculations are triggered whenever a student’s schedule changes through the scheduling engine or PowerScheduler functionality, such as manually changing a student’s schedule. There are situations in which a student’s schedule can be created without using these processes, such as by importing a schedule. You can use the Calculate Percent Schedules function to recalculate all students' percent scheduled numbers, including those students' schedules that were not created through other functions.

Note: This function always recalculates the entire set of students identified for scheduling.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Calculate Percent Schedules**. The Alert page appears, indicating that the percent schedules calculation completed.

How to Copy the Master Schedule

Copy the current year's master schedule to another year. After copying the master schedule, do the following:

- *Regenerate bitmaps* from the Functions menu.
- Align the active scenario to the imported master schedule in terms of years and terms, periods, and days. For more information, see *Build Scenarios*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Copy Master Schedule**. The Copy Master Schedule page appears.
4. Choose the year from which you want to copy the master schedule from the School pop-up menu.
5. Select the checkbox to proceed.
6. Click **Submit**. The Changes Recorded page appears.

How to Delete the Master Schedule

Delete the current year's master schedule.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Delete Master Schedule**. The Delete Master Schedule page appears.
4. Select the checkbox to proceed.
5. Click **Submit**. The Changes Recorded page appears.

How to Move Previous Year Data

Use this function to delete all constraints, relationships, and teacher/course assignments for the current build and replace them with constraints, relationships, and teacher/course assignments from the selected build.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Move Previous Year Data**. The Move Previous Year Data page appears.
4. Choose the build that you want to use to overwrite the current build from the pop-up menus.
5. Select the confirmation checkbox to proceed.
6. Click **Submit**. The Changes Recorded page appears.

How to Regenerate Bitmaps

Reset the bitmap from the expression for all sections and constraints in the current build. Regenerate bitmaps after importing any constraints that use an expression, such as preschedule, room free, teacher free, or course restrict constraints.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Regenerate Bitmaps**. The Expression to Bitmap page appears.
4. Select the checkbox to proceed.
5. Click **Submit**. The Scheduling Functions page appears.

How to Reset Section Meetings

When section data has been imported or modified and the section meetings table does not refresh, the courses will not appear in matrix views or on manual enrollment pages. Force a refresh of the section meetings table.

The currently-selected school determines which school is affected. If you perform this function at the District level, all schools' Section_Meeting records will be reset.

Note: For better performance, run this function outside of school hours.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.

3. Click **Reset Section Meetings**.
4. Select the checkbox to reset all PowerScheduler section meetings values based on the current schedule expressions for the selected school.
5. Click **Submit**. The Scheduling Functions page appears.

How to Reset Class Counts

Use this function to reset the number of students in each section for all courses in the current build.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Reset Class Counts**. The system resets the number of students in each section in the current build. The Scheduling Functions page appears.

How to Reset Teacher Assignments

Use this function to reset the number of teacher assignments for all courses in the current course catalog.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Reset Teacher Assignments**. The Scheduling Functions page appears.

How to Resolve Invalid Requests

Every year there may be students with invalid requests. Using this function, you can resolve the following types of invalid requests:

- Invalid School - The school ID in the request is different than the school the student is being scheduled for.
- Invalid Course - The course in the request is not a valid future year course requests due to one of the following reasons:
    - The course is not in the active course catalog in PowerScheduler.
    - The **Schedule This Course** checkbox is not selected. For more information, see *How to Define Scheduling Preferences*.
    - The course is not set as **Available** for the year to be scheduled. For more information, see *Edit Course Status* or *Edit Availability for Schools and Year*.

Note: This function does not check for the following types of invalid requests:

- Requests related to students who are not set to be scheduled.
- Students set to be scheduled at another school that have a course request for the school you are running the function from.
- Invalid requests based on unfulfilled prerequisites. For more information, see *Course Requests: Invalid Requests*.
- Support identifying current year invalid requests.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Resolve Invalid Requests**. The Resolve Invalid Requests page appears.
4. If needed, click the **Filter** arrow to expand this section.

   Note: Click the **Filter** arrow again to collapse this section.

5. Use the following table refine your search:

Field	Description
Search	Enter search criteria in the **Search** field.
Filter	1. To filter by columns: a. Click **+**. b. From the first pop-up menu, choose one of the following: • **Course Name** • **Course Number** • **Status** • **School** • **Student Name** c. Enter search criteria in the search field. **Note:** Use a comma-separated list for multiple values. d. Click **Apply**. The page refreshes and display filtered results.

	2. To add another filter, click **+** and repeat Step 1. **Note:** The **+** appears shaded if all filters have been added. 3. To delete a filter, click **-** next the filter. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

The following information appears:

Note: This function displays the first 1000 invalid requests. If there are more than 1000 invalid requests, resolve the initial list and run the function again.

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	Description
[Checkboxes]	Do one of the following • Select the checkbox in the header row to select all invalid requests. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all invalid requests. • Select the checkbox for each invalid request you want to work with.
Student Name	The last, first name of the student with the invalid request.
Course Name	The course name of the invalid request.
Course Number	The course number of the invalid request.
School	The school where the invalid request has been made.
Status	The status of the invalid request.

6. Do one of the following:

<table>
<tr><th>Action</th><th>Description</th></tr>
<tr><td>To remove invalid requests</td><td>1. Click Delete Requests.
2. Click Confirm Delete Requests. A confirmation message appears.</td></tr>
<tr><td>To resolve invalid requests due to an invalid school</td><td>Click Change School to resolve an invalid request due to the school ID in the request being different than the school the student is being scheduled for. A confirmation message appears indicating the school ID in the request has been changed to the school you are running the function from.</td></tr>
<tr><td>To resolve invalid requests due to an invalid course</td><td>1. Click Change Course. The Select Course drawer appears.
2. Enter search criteria in the Search field.
3. To filter by columns:
a. Click +.
b. From the first pop-up menu, choose one of the following:
• Course Name
• Course Number
• Department
c. Enter search criteria in the search field.

Note: Use a comma-separated list for multiple values.

d. Click Apply. The page refreshes and display filtered results.
4. To add another filter, click + and repeat Step 1.

Note: The + appears shaded if all filters have been added.

5. To delete a filter, click - next the filter.
6. Click Apply. The page refreshes and display filtered results.

Note: To remove all filter selections, click Clear.</td></tr>
</table>

	7. Click **Submit**. The Select Courses drawer closes, and a confirmation message appears.

How to Set the Schedule Year

Because course requests can be made for the current year or for other scheduling years, you must set the schedule year for student requests made in PowerScheduler, in the PowerSchool Student and Parent portal, or on the Requests Modify Future page in PowerSchool.

For example, set the scheduling year to **2015-2016** if you want students to enter course requests for the 2015-2016 year. In this case, the request Screen Setup function in PowerScheduler will apply to the 2015-2016 school year. The student's requests made through the Requests Modify Current page in PowerSchool will apply to the 2014-2015 school year. For more information about student course requests, see *Student Course Requests*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Set Schedule Year**. The Set Schedule Year page appears.
4. Choose the schedule year from the pop-up menu.

   Note: Only the years established on the Years & Terms page appear in the pop-up menu. To select a year that is not listed, you must first set up that scheduling year. For more information, see *Auto Scheduler Setup*.

5. Click **Submit**. The Scheduling page appears.

How to Split Year-Long Classes

Use this function to split year-long classes into smaller terms. By creating year-long classes and then using this function to divide the class into smaller terms, you reduce the number of classes you need to set up.

Note: Perform this function only when you are ready to commit your master schedule.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Split Year-Long Classes**. The Split Year-Long Classes page appears.
4. Select the term segment into which you want to split year-long classes.
5. Select the checkbox to proceed.
6. Click **Submit**. The Changes Recorded page appears.

Load Process: Load Constraints

Load constraints restrict the way the system loads students into courses. Define load constraints before performing a load. To compare results of a load with and without load constraints, first perform a load and then define load constraints.

PowerSchool contains six types of load constraints you can define. Use each one to constrain student schedules in a specific way. For example, use a Student Preference constraint to force a student to be scheduled in a particular teacher's section.

Note: Since constraints restrict student schedules, the more constraints you define, the less flexibility the system has to load students into courses and the less optimal the resulting schedule will be. It is always best to use the fewest number of constraints required to accomplish your scheduling goals.

To view a list of load constraints and the number of each that have been defined for your schedule, choose Load Constraints from the constraints menu.

For more information about load constraints, see *Define Load Constraints*.

Define Load Constraints

Set up constraints to force PowerScheduler to load student schedules in a particular way. You must build your master schedule before you can define load constraints.

Note: To view a list of load constraints and the number of each that have been defined for your schedule, choose Load Constraints from the constraints menu.

To edit or delete constraints, see *Work with Load Constraints*.

How to Add a Balance Adjustment Constraint

Use a Balance Adjustment constraint to pre-load a course section with a certain number of reserved seats before adding the rest of the students. For example, use this constraint if you have a math class that needs five seats open for SPED students.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Balance Adjustment**. The Balance Adjustment Constraints page appears.
4. Click **New**. The Edit Balance Adjustment Constraint page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Course Number	Click **Associate** to select the name of the course you want to balance.
Section Number	Enter the section number of the selected course that you want to balance.
Teacher	Click **Associate** to select the name of the teacher who instructs this course section.
Number of Reserved Seats	Enter the number of seats to be held.

Note: You must either enter a section number or select a teacher.

6. Click **Submit**. The Balance Adjustment Constraints page appears.

How to Add a Student/Student Avoid Constraint

Use a Student/Student Avoid constraint to specify that two selected students cannot be scheduled into any of the same course sections.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Student Avoid**. The Student/Student Avoid Constraints page appears.
4. Click **New**. The Edit Student/Student Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student 1	Click **Associate** to select the name of one of the students you want to separate from one another.
Student 2	Click **Associate** to select the name of the other student.

6. Click **Submit**. The Student/Student Avoid Constraints page appears.

How to Add a Student/Teacher Avoid Constraint

Use a Student/Teacher Avoid constraint to specify that this student and this teacher cannot be scheduled into any of the same course sections.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Teacher Avoid**. The Student/Teacher Avoid Constraints page appears.
4. Click **New**. The Edit Student/Teacher Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student	Click **Associate** to select the name of the student you want to avoid scheduling with a selected teacher.
Teacher	Click **Associate** to select the name of the teacher you want to avoid scheduling with the selected student.

6. Click **Submit**. The Student/Teacher Avoid Constraints page appears.

How to Add a Student Free Constraint

Use a Student Free constraint to specify those periods when a student must be free, such as when taking a course at another school.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Student Free**. The Student Free Constraints page appears.
4. Click **New**. The Edit Student Free Constraint page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Student	Click **Associate** to select the name of the student who needs to have a free periods.
Term	Choose from the pop-up menu the term in which this student needs free periods.
Schedule	Select the checkbox next to each period in each day that you want to schedule this student to have a free periods.

6. Click **Submit**. The Student Free Constraints page appears.

How to Add a Section Link Constraint

Use a Section Link constraint to specify that if students are enrolled in one course section, they must also be enrolled in another, specific course section.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Section Link**. The Section Link Constraints page appears.
4. Click **New**. The Edit Section Link Constraint page appears.
5. Use the following table to enter information in the fields:

Field	**Description**

Course Number 1	Click **Associate** to select the name of one of the courses for which you want to link a section.
Section Number 1	Enter the section number of the course in the Course Number 1 field that you want to link to another course section.
Course Number 2	Click **Associate** to select the name of the other course for which you want to link a section.
Section Number 2	Enter the section number of the course in the Course Number 2 field that you want to link to the section in the Section Number 1 field.

6. Click **Submit**. The Section Link Constraints page appears.

How to Add a Student Preference Constraint

Use a Student Preference constraint to schedule a student into a particular course section, term, or teacher.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Student Preference**. The Student Preference Constraints page appears.
4. Click **New**. The Edit Student Preference Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student	Click **Associate** to select the name of the student you want to force to schedule in a specific course section.
Course Number	Click **Associate** to select the name of the course.

Term	Choose the term to which you want this constraint to apply from the pop-up menu (optional).
Section Number	Enter the section number of the course into which you want the student to be scheduled (optional).
Teacher	Click **Associate** to select the name of the teacher who instructs this course section (optional).

Note: Though the last three fields are optional, you must make a selection for at least one of the fields.

6. Click **Submit**. The Student Preference Constraints page appears.

Load Process: Load Students

Once you have a satisfactory master schedule, you can begin fine-tuning student schedules by running a load.

Do not load students into your master schedule until you are satisfied with it. Loading will not have any impact on the structure of the schedule, just on the placement of students within it. Also, do not make manual adjustments to student schedules and then reload students; the system will overwrite all of the changes you made.

Note: It is recommended that you run the first load before you define any load constraints.

How to Run a Load

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Load** from the PowerScheduler menu. The Load Student Schedules Queue page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Load type	Select a type of load:

	• **Load all students**: The system reschedules all students. Previously created student schedules or manually adjusted student schedules are deleted. • **Balance**: The system adjusts student schedules to help improve the balance of students among sections. There is no guarantee that students' schedules will not change. • **Reschedule the selected [x] students**: The system reschedules only students whose schedules have not been locked. You can select this option multiple times.
Close sections at maximum	Select the checkbox to ensure that courses close at their maximum enrollment numbers. **Note:** Do not select the checkbox the first time you do a load. The build itself runs without considering section maximums, so this will let you determine if you can get a little better load percentage. Also, not closing sections at their maximums will help you focus on students with conflicts.
Use global course substitutes	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use student course substitutes	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.

4. Click **Execute**. The engine starts to run. For more information, see *Understand the PowerSchool Scheduler Page*.

   To view details about the load, click **(Q)** next to Load in the PowerScheduler menu, then click **View** in the Load Log column on the Load Student Schedules Queue page. To view errors and messages produced by the load, click **View** in the Results Log column. For more information about the Results Log, see *Load Results Log*. After successfully loading schedules, import the results of the load. For more information about importing, see *Import Student Schedules*.

Import Student Schedules

After you load students into schedules, you must import the results to display student schedules in PowerSchool.

If you import schedules that have changed for a student or a group of students after the first import, only the schedules of the selected students will be overwritten. Students schedules that did not change since the last import are not affected.

How to Import Student Schedules

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **(Q)** next to Load from the PowerScheduler menu. The Load Student Schedules Queue page appears.
3. Click **Import** in the appropriate row in the Results column. The Load Student Schedules Queue page appears.

Analyze the Results

When the load finishes, percentages for students with requests, students without conflicts, and total requests satisfied appear on the main Scheduling page.

To display the Scheduling page, choose **PowerScheduler** under Applications in the main menu on the PowerSchool start page. The page displays the following information:

Field	Description
Build Scenario	The name of the build scenario. **Note:** Click the name of the scenario to view or edit its information.
Last Build	The most recent date you built the master schedule for a build scenario.
Last Load	The most recent date you loaded student schedules for a build scenario.
Students With Requests	The number of students for whom course requests were entered.

Requests Satisfied	The number of all primary student course requests satisfied.
Students Without Conflicts	The percentage of students without any conflicts in their schedules.
Status	Indicates if the build scenario is active or inactive.
%Scheduled	The percentage of requests successfully filled.
%Core Scheduled	The percentage of requests for core classes successfully filled.
%Requests Satisfied	The percentage of total requests including alternate requests that were filled.

Load Results Log

Similar to the build results log, the load results log displays the names of students it cannot schedule. It also provides possible reasons the engine did not run properly and alerts you to any potential issues the engine finds.

How to View the Load Results Log

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **(Q)** next to Load from the PowerScheduler menu. The Load Student Schedules Queue page appears.

   Note: Use this page to import the student schedules after being loaded. For more information, see *Import Student Schedules*.

3. Click **View** in the Results Log column of the appropriate row. The "Results Log for [school name]" page appears.

   If the build stops because of validation errors, the results log displays details about these errors. There are three types of errors:

- Info: These messages are informational, such as "Course [x]: Rescheduled [x] students out of [x] (leaving [x] unscheduled)." These do not prevent a successful load.
- Warning: These are "red flag" messages, such as "The teacher's preferred room is not suitable for the course the teacher is teaching." These do not prevent a successful load.
- Error: These messages are validation errors that must be corrected in order for the engine to run, such as "Invalid valid term found in the Course file (does not match the term length)." These do prevent a successful load.

For more information about validation messages, see *Build Validation*.

Load Process: Post-Load Options

After completing a load, you can do one or more of the following:

1. Accept the results of the load and begin manually adjusting student schedules. Select this option only if you are positive that the master schedule will not change and that student schedules are correct. Verify student schedules to make sure the master schedule is correct.
2. Resolve student conflicts by using or adding alternate course requests if you did not use them in the first load. If your schedule contains alternate student course requests but you did not allow the system to use them, rerun the load and select the substitutes options.
3. Manually adjust student course requests to allow better scheduling. For example, if a student has a course request that is impossible to meet, change it. Repeat this process until you are satisfied with the results.
4. Select the students you want to reschedule. Then, reload student schedules.

If you select option 2, 3, or 4 above, you may need to reload student schedules. For more information, see *Load Process: Load Students*.

Reload Students

After you make changes to student course requests, you may want to reload the affected students into the master schedule. For more information about rescheduling students, see *Run a Load*.

How to Reload Students into the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Search for and select the group of students you would like to reschedule.

   Note: You must select the students before you reschedule.

3. Under Processing in the PowerScheduler menu, choose **Load** from the PowerScheduler menu. The Load Schedules page appears.

   Note: By default, all student schedules are unlocked. Only the Reschedule option adjusts unlocked student schedules.

4. Select the **Reschedule the selected [x] students** option.
5. Click **Execute**. The Load Student Schedules (Step 2) page appears.
6. Use the following table to enter information in the fields:

Field	**Description**
Load type	Select the **Reschedule the selected [x] students** option.
Close sections at maximum	Select the checkbox to ensure that courses close at their maximum enrollment numbers.
Use global course substitutes	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use student course substitutes	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.

7. Click **Execute**. The engine starts to run. For more information, see *Understand the PowerSchool Scheduler Page*.

Manually Adjust Student Schedules

Manually adjust and fine-tune student schedules only if you are certain that the master schedule will not change and that student schedules are correct.

Note: Running a load will cause manual modifications to be lost. Instead, choose the Reschedule the selected [x] students option when loading. For more information, see *Run a Load*.

You can also manually enroll students in courses based on their course requests. For more information, see *How to Manually Schedule Students*.

Note: If you use the Balance Adjustment constraint to pre-load a section with a certain number of "placeholder students," you need to manually schedule students into those seats after loading the rest of the student schedules. For example, if you use this constraint in a section of a math course to hold five seats for Special Education students, you need to schedule those Special Education students into the math section after loading the other students' schedules.

How to Enroll a Student in a Course

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Schedule** from the pop-up menu.
    - Click the **Schedule** tab.

    The Schedule page displays the percentage scheduled calculations for the student:

    - % Scheduled - Percentage of requests successfully filled
      Calculated by rounding ((enrolledSlots * 100) / timeSlots)
    - % Core Scheduled - Percentage of requests for core classes successfully filled
      Calculated by rounding ((coreSlots * 100) / coreTimeSlots)
    - % Primary Requests Satisfied - Percentage of primary requests (non-alternate requests) that were successfully filled
      Calculated by rounding ((primeReqSatisfied * 100) / totalRequests)
    - % Total Requests Satisfied - Percentage of total requests including alternate requests that were filled
      Calculated by rounding ((totalReqSatisfied * 100) / totalRequests)

    Note:

TimeSlots calculated by
number_of_terms * number_of_days * number_of_periods
-- find timeSlots by buildId
select sterms * dpcycle * ppday as timeSlots
from scheduleBuilds
where buildId = <scheduleBuilds.buildId>;

CoreTimeSlots calculated by
number_of_terms * number_of_days * number_of_core_periods
-- find coreTimeslots by buildId
select sterms * dpcycle * (select count(*) from schedulePeriods where buildId = <scheduleBuilds.buildId> and corePeriod = 1) as coreTimeSlots
from scheduleBuilds
where buildId = <scheduleBuilds.buildId>;

TotalRequests calculated by
-- find totalRequests by studentId and yearId, excluding any global alternate course
select count(*) totalRequests
from scheduleRequests
where studentId = <students.id>
and yearid = <4-digit-yearid>
and globalAlternateCourse = 0;

Percentage calculated by
-- get student requests statistics by studentId and buildId
select totalRequests, enrolledSlots, coreSlots, primeReqSatisfied, totalReqSatisfied
from studentSchedulingResults
where buildId = <scheduleBuilds.buildId>
and studentId = <students.id>;

Note: To determine which student course requests have yet to be filled, see the "Unfilled Requests" section of the page.

6. Choose from the **Enroll** pop-up menu the period in which you want to enroll this student in a course. The Available Courses page appears.

   Note: For information about the filter options, see *How to Filter Manual Schedule Options*.

   The page displays the following information:

Field	Description

Crs.Sec	The course and section number.
Course Name	The course name. Click a course name to automatically add it to the student's schedule.
Expression	The period and day combination.
Term	The selected term.
Teacher	The teacher's name.
Grade	The grade level.
Credit Type	The credit type, such as Math.
Cr Hrs	The number of credit hours earned by taking this course.
Enrollment	The number of students currently enrolled in this course during the selected period.

How to Drop a Student From a Course

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Schedule** from the pop-up menu.
    - Click the **Schedule** tab.

    The Schedule page appears.

6. Click the **Drop** pop-up menu.

7. Choose the period in which you want to drop this student from a course. Period names in the menu match the periods on the page. For example, to drop a course that convenes during Period A2 in Semester 2, choose the second occurrence of A2. The Student's Schedule page appears.

   Note: To simultaneously drop more than one course, select the checkboxes in the appropriate rows, and then click **Drop Classes**.

How to Filter Manual Schedule Options

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
   - Choose **Schedule** from the pop-up menu.
   - Click the **Schedule** tab.

   The Schedule page appears.

6. Choose from the **Enroll** pop-up menu the period in which you want to enroll this student in a course. The Available Period Courses page appears.
7. Select one or more of the following filters on the Available Period Courses page:

Field	Description
Period	Choose the period from the pop-up menu.
Term	Choose the term from the pop-up menu.
Teacher	Choose the teacher from the pop-up menu.
Day	Choose the day from the pop-up menu.
Grade	Choose the grade level from the pop-up menu.

Credit Type	Choose the credit type, such as MATH, from the pop-up menu.
Course	To jump to a particular course, enter the course number and press RETURN (Mac) or ENTER (Windows).
Show only classes with available seats	Select the checkbox to display only classes that have not reached the maximum enrollment.

Note: To enroll the student in a course, see *How to Enroll a Student in a Course*.

How to Mass Enroll a Group of Students in a Course

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. On the Selected Students page, click **Functions**. The Scheduling Functions page appears.
5. Click **Schedule Mass Enroll**. The Mass Enroll page appears.
6. Use the following table to enter information in the fields:

Field	Description
Teacher	Choose the teacher from the pop-up menu. If you select the course by teacher, you must also indicate the appropriate period and day of the course section.
Period	Choose the period from the pop-up menu.
Day	Choose the day from the pop-up menu.
Term	Choose the term from the pop-up menu.
course.section	Alternatively, enter the course and section number. Separate the course and section numbers with a period and no spaces.

7. Click **Submit**. If the Mass Enroll - Dependent Sections page appears, the course has dependent sections.
8. Select one of the following option for the selected students:
   - **Enroll in [course name] and its dependent sections**
   - **Enroll in [course name] only**
9. Click **Submit**. The Changes Recorded page appears.

Update Selections

Use the Update Selections function to update a group of selected records at one time. Update selections for procedures such as *Unlock Previously Scheduled Courses*, *How to Set the Next Year Grade Field for an Entire Grade Level*, *How to Schedule All of Next Year's Students*, and *How to Assign a Group of Students to a Building, House, or Team*. For general instructions, see *How to Update Selections*.

How to Update Selections

To change the records for a group of students, first select the student group. For examples of how to search for a group of students, see *How to Set the Next Year Grade Field for an Entire Grade Level*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Update Selections**. The Update Selections page appears.
4. Use the following table to enter information in the fields:

Field	Description
Current Table	Choose the table from which you want to export records from the pop-up menu. **Note:** See http://your.school.address/admin/home?ac=structure for a complete list of PowerSchool tables and fields.
Select all [x] records in this table	To indicate the records to use in the export, either: • Click **Select all [X] records in this table** to select all records. Skip to Step 6.

	• Identify search criteria in the Search fields by continuing to the next step.
Search Students	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: • Equals (=) • Less than (<) • Greater than (>) • Less than or equal to (<=) • Greater than or equal to (>=) • Does not equal (#) • Contains (contains) • Does not contain (!Contain) In the last field, enter the value for the field.

5. Click **Search within the current [# of selected] records only**. The Update Selections page displays the new number of current records in selection.
6. Do one of the following:
   - Click **List View** to view the selections.
   - Click **Select Records by Hand** to narrow the selection. Press and hold COMMAND (Mac) or CONTROL (Windows) and click the selections you want to keep. Click **Submit**.
   - Click **Modify Records** and continue to the next step. The Modify Records page appears.
7. Choose from the pop-up menu the field to modify in the selected records.
8. Enter the value for the field to modify in the selected records.
9. Click **Modify Selected Records**. The system updates the records, and the Update Selections page appears.

Commit the Master Schedule

When you have a satisfactory schedule and want to make it your master schedule for the next school year, you must commit it. Once a schedule is committed, it replaces any existing master schedule and becomes your current schedule.

You can commit the schedule as soon as the current academic year has ended, or you can wait until just before the next academic year begins. If your periods for the next academic year are set up exactly as they are for the current year, you can commit the schedule as soon as you are confident that you no longer need to build or load.

Note: If you use PowerScheduler to create a master schedule, you should commit your master schedule before running the End-of-Year Process. The End-of-Year process modifies each student's Next School Indicator and Next Year Grade. If PowerScheduler is used after running the End-of-Year process, it is likely that students will be scheduled for the wrong school or grade level.

For information about committing the master schedule, see *When to Commit the Master Schedule*.

When to Commit the Master Schedule

When your schedule is as good as it can possibly be, and school is no longer in session, commit the master schedule. When you commit a master schedule, it replaces any existing master schedule for that school year.

To ensure that attendance is set up properly, your "live side" school year should be created before committing your schedule in PowerScheduler. Also, when committing a master schedule, course information, including credit hours, is retrieved from the district level in PowerSchool.

How to Commit the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Commit**. The Commit Master Schedule page appears.
3. Select which schedules to copy:
    - **Sections Only**: Select this option to commit only sections.
    - **Student Schedules Only**: Select this option to commit only student schedules.
    - **Sections & Student Schedules**: Select this option to commit both sections and student schedules.
4. Click **Submit**. The Verify Commit Master Schedule page appears.

5. Click **Submit**. The Commit Master Schedule Warnings page displays if there are any conflicts or unavailable courses. If there are no conflicts or unavailable courses, skip to Step 6.

   Note: Only school calendar conflicts are committed as part of the master schedule; unavailable courses are not.

6. If you are certain you want to commit, click **Submit** to proceed. The Changes Recorded page appears.

Load Process: Print Schedules and Rosters

Print schedules and rosters either before or after you commit the master schedule.

How to Print Student Schedules

Use the Student Schedule List report to view the number of courses scheduled by each student. You can also use this report to view each student's schedule. Print student and teacher schedules either before or after you commit your master schedule.

Note: You can also print student schedules using a report card template.

To run this report for a specific group of students, first select those students. Then, select the Use Selected Students checkbox on the Scheduling Reports page before clicking **Student Schedule List**.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student Schedule List**. The Student Classes Scheduled page displays the following information:

Field	Description
#	The numbered list of students.
Student	The student's name. Click the heading to sort the list by student name.

% Scheduled	The percentage of the student's course requests that were fulfilled. Click the heading to sort the list by percentage scheduled.
Classes Scheduled	The number of courses that have been scheduled for this student. Click the heading to sort the list by the number of classes scheduled. Click the number per student to view the student's Schedule page.

How to Print Class Rosters (PDF)

Generate a class roster as a PDF file for the current or previous terms. Print class rosters either before or after you commit your master schedule.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Class Rosters (PDF)**. The Class Rosters (PDF) page appears.
3. Use the following table to enter information in the fields:

Field	Description
Print rosters for	Select the teachers for which you want to generate a class roster. To select multiple teachers, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each teacher's name.
Meetings	Indicate the meetings to be audited by selecting the appropriate checkboxes. To audit all meetings, deselect all of the checkboxes.
Include students who	Select an enrollment period option. Some options require you to enter a date or date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Heading font	Choose the heading font from the pop-up menu.
Size, line height, style	Enter the heading font size and line height in points. One point equals 1/72 of an inch.

	Select the **Bold** checkbox to bold the heading. Select the **Italic** checkbox to italicize the heading. Select the **Underline** checkbox to underline the heading.
Print heading on	Choose an option from the pop-up menu to determine how you want the heading to print: • **First page of each class** • **All pages** • **Do not print heading**
Heading text	Enter the content you want to appear in the heading. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
Column title font	Choose the column title font from the pop-up menu.
Size, line height, style	Enter the column title font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the column title. Select the **Italic** checkbox to italicize the column title. Select the **Underline** checkbox to underline the column title.
Print column titles on	Choose an option from the pop-up menu to determine how you want the column title to print: • **All pages** • **First page of each class**

	• **Do not print column titles**
Roster Font	Choose the roster listing font from the pop-up menu.
Size, line height, style	Enter the roster listing font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the roster listing. Select the **Italic** checkbox to italicize the roster listing. Select the **Underline** checkbox to underline the roster listing.
Roster columns	Enter the content to include in the student listings columns using the format field name \ column title \ column width \ alignment. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
Rule width	Enter the thickness in points of the vertical and horizontal lines on the report, as well as the outline of the entire report. One point equals 1/72 of an inch.
Cell padding	Enter the width of each cell and the amount of space from all sides of the cells to the text in points. One point equals 1/72 of an inch.
Page size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Enter the size of the margins in inches.

Orientation, Scale	Use the pop-up menu to choose the page layout. **Portrait** is a vertical page; **landscape** is a horizontal page. Scale is the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

PowerScheduler User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Master Schedule Overview

Without the proper tools, building a school's master schedule can be a difficult and time-consuming process. When you build a schedule, you must not only consider periods and classes, but also student course requests, teacher schedules, teacher course requests, and dozens of other factors that make it a difficult process.

PowerSchool considers all schedule factors and determines the best possible schedule from hundreds of thousands of possibilities. The resulting master schedule satisfies the most requirements and minimizes the most conflicts.

Building a school's master schedule is done in four phases:

- *Prepare to Build the Master Schedule*
- *Build Master Schedule Introduction*
- *Load Students*
- *Commit the Master Schedule*

Much of the work necessary to create a master schedule must be completed before building the schedule. To prepare to build a master schedule, you must define scheduling parameters, such as courses and classrooms, and enter student course requests, teacher assignments, course information, and schedule constraints. The system weighs all of the parameters that you define and generates the best possible master schedule.

Because there are many ways to arrange a master schedule, you can create test scenarios using your data and different variables to determine the best possible results for your school. For example, you might create several different scenarios containing more or fewer constraints to determine how the system arranges your courses. You can save and modify these scenarios as you work toward the best possible master schedule.

Complete all of the steps in the section *Prepare to Build the Master Schedule* before you can proceed to the section *Build Master Schedule Introduction*. After building, load student requests into the master schedule and commit the master schedule to PowerSchool.

Generally, schools follow the build, load, then commit process when creating their master schedules. Though this suggested series of steps applies to most situations, there are exceptions. For example, you can build a master schedule without loading student schedules; instead, you could import student schedules. However, doing so will not take into consideration section size maximums or load constraints. You can also load schedules without first building a master schedule if you copy or import schedules or if you manually built a master schedule.

During both the preparing and building phases of this process, you will likely want to run certain reports. See *Master Schedule Reports* for descriptions of scheduling reports that you may use. There are several checklists to help you throughout the process. For more information, see *Checklists*.

When you click **PowerScheduler** on the start page, the Scheduling page displays for each scenario the name, date of the last master schedule build, last load of the student schedules into the master schedule, number of students with requests and satisfied requests after the last load, and percentage of students without scheduling conflicts.

Note: The Students With Requests and Students Without Conflicts statistics only update after the build or the load finish completely.

The status of each scenario appears. Only one scenario can be active at any given time; the others are considered inactive. Also, the Scheduling page displays for each scenario the percent of students scheduled, the percent of core requests scheduled, and the percent of satisfied student course requests.

The PowerScheduler menu displays the main scheduling functions, which are designed and sequenced to help you build your master schedule. The main scheduling functions list is divided into the following functional areas:

Requesting

- **Course Groups:** Create course groups in preparation for creating request forms.
- **Screen Setup:** Create the request forms that will be used for entering student course requests.

Scheduling Setup

- **Scenarios:** Maintain your schedule scenarios. You can select a scenario or create a new one.
- **Auto. Scheduler Setup:** Set up certain defaults for build scenarios. This is the starting point when building a master schedule, since you must begin by setting up the Scheduling Years and Terms, Days, and Periods before you can proceed with building your master schedule.
- **Course Catalogs:** Create or edit a course catalog.
- **Years & Terms:** Define the schedule years and terms.
- **Periods:** Define the schedule layout for periods.
- **Days:** Define the schedule layout for days.
- **Buildings:** Define the names of buildings.
- **Constraints:** Define constraints for the schedule, such as days that teachers are free, prescheduled courses, and breaks.
- **Departments:** Define the names of departments.
- **Facilities:** Define the names of facilities.
- **Houses:** Define the names of houses.

- **Section Types:** Define the section types of courses, such as special education.
- **Teams:** Define teams.

Resources

- **Courses:** Define schedule information for each course in your course catalog, such as assignments, constraints, and relationships.
- **Rooms:** Define classroom information, such as physical size and location.
- **Students:** Define student information, such as constraints, requests, and preferences.
- **Teachers:** Define teacher information, such as assignments, teams, and homerooms.

Processing

- **Course Rank:** View the system-generated course rank or change the order of the course rank.
- **Build (Q):** Build the master schedule.
- **Load (Q):** Load student information, such as requests, into the master schedule.
- **Automated Study Hall:** For students that have gaps in their schedules, enroll those students into study hall periods.
- **Commit:** Commit the built master schedule to PowerSchool.

Schedule

- **Master Schedule:** Make changes to your master schedule once it is built but before it is committed. Change sections, teachers, student course requests, and schedules.
- **Visual Scheduler:** Use to create your master schedule using drag-and-drop capabilities.
- **Sections:** Create a new course section or edit information about an existing one.

Tools

- **Checklist:** Use this checklist to keep track of all the tasks needed to prepare to build a master schedule.
- **Engine Download:** Download a current version of the scheduling engine. This link will be updated as the engine is updated.
- **Functions:** Perform functions such as calculate sections and update selections.
- **Reports:** Run all schedule-related reports.

To return to the PowerScheduler menu when the main menu changes, click **PowerScheduler** in the navigation path.

Checklists

Refer to several checklists to help you as you prepare to build and load the master schedule. Access the checklists from either PowerSchool or PowerSchool Help:

- Scheduling Checklist: This checklist guides you through each process when building a master schedule. It is especially helpful when multiple people are building the master schedule, since you can set the status of each step from "No Status" to "In Progress" to "Complete." Enter comments for each step or for the overall process to share information. This checklist displays items for both building a master schedule and loading students' schedules, or just for loading students' schedules. The appropriate checklist appears depending on whether the current scenario is "build and load" or "load only." To access this checklist, choose **Checklist** under the Tools heading from the PowerScheduler main menu.
- Master Schedule Checklist: Use this checklist to ensure that the master schedule is ready to optimize, load, or print. See *Master Schedule Checklist*.
- Checklist to Know Your Student Schedules are Complete: Use this checklist to determine that the entire process of building the master schedule is complete. See *Checklist to Know Your Student Schedules are Complete*.

Schedule Search and Select

Before you can do any type of schedule-related work on a student's record or on a group's records, select the individual or group. By performing a search, you make such a selection.

When you select a student, his or her name appears in the main menu. Either click the student's name to work with that student or go to the PowerScheduler menu to perform functions for that student.

If you select a group of students, the selected students' names appear in the students menu. Then, go to the PowerScheduler menu to perform functions for the group of students.

How to Select Students for Scheduling

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students**. The Scheduling page appears.
3. Note the following information in the left navigation menu:

Field	Description

Search Students	Using the pop-up menu, you can choose the student page you want to work with: • **Constraints** • **Demographics** • **Grad Planner** • **Grad Progress** • **Matrix** • **Preference** • **Requests** • **Schedule** **Note:** These options also appear as tabs on the student pages.
Functions	Click **Functions**. The *Student Scheduling Functions* page appears for the selected students.

4. Select the student you want to work with using any of the following methods:

Field	**Description**
[Search Students]	Enter search criteria in the search field. If Smart Search is enabled, as you begin entering your search criteria, PowerSchool automatically provides a drop-down list of suggestions that you may choose from.
[Search Icon]	Click to initiate the search.
View Field List	Click to view the PowerSchool Field List pop-up, which displays a list of all fields that can be used to perform a student search. **Note:** Database extension fields can be selected from the pop-up, but any associated one-to-many tables are not searchable at this time. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.
[Alphabet]	Click a letter of the alphabet to display a list of students whose last names begin with the selected letter. For example, if you click

	B, the system displays the students at your school whose last names begin with a "B".
Next Year Grade Level	Click a number to display a list of students in the next year grade level. If you click **9**, the system displays a list of ninth graders at your school for next year.
Current Year Grade Level	Click a number to display a list of students in the current year grade level. If you click **9**, the system displays a list of ninth graders at your school for this year.
[Gender]	Click **M** to display a list of all the male students at your school. Click **F** to display a list of all the female students at your school.
All	Click to display a list of all active students at your school.
Current Selection	Click to quickly return to the last group of selected students without repeating a search function.

Note: For more information, see *Student Search*.

5. If only one student's name appears or if you want to select all of the students, continue to Step 5. If you want to select one or more but not all of the students, click **Select Students By Hand**. Press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the students' names.

   Note: If the students are listed consecutively, click the first name on the list. Press SHIFT as you click the last name on the list. This selects the first and last names you click and every name in between.

6. Do one of the following:
   - Click **Functions**. The *Student Scheduling Functions* page appears for the selected students.
   - Click **Select these students**. The students' names appear in the students menu.

Student Scheduling Functions Page

Use the Student Scheduling Functions page to execute processes for the selected group of students. To select a group of students, see *Schedule Search and Select*.

The student Scheduling Functions page includes the following functions:

- *Export Using Template*
- *List Students*
- *Mass Add Requests*
- *Mass Delete Requests*
- *Next School Indicator*
- *Print Reports*
- *Print Mailing Labels*
- *Quick Export*
- *Reports Menu*
- *Schedule Mass Enroll*
- *Schedule Reports Menu*
- *Work with these students*

Scheduling Functions Page

Use the Scheduling Functions page to run processes related to the master schedule.

The Scheduling Functions page includes the following functions:

- *Auto Create Rooms*
- *Auto Fill Student Information*
- *Auto Fill Course Information*
- *Auto Fill Teacher Information*
- *Auto Generate Course Information*
- *Auto Generate Rooms*
- *Auto Generate Teacher Assignments*
- *Calculate Percent Schedules*
- *Calculate Target Number of Sections to Offer*
- *Copy Master Schedule*
- *Delete Master Schedule*
- *Duplicate Scenarios*
- *Move Previous Year Data*
- *Regenerate Bitmaps*
- *Reset Section Meetings*
- *Reset Class Counts*
- *Reset Teacher Assignments*
- *Resolve Invalid Requests*
- *Set Schedule Year*

- *Split Year-Long Classes*
- Update Selections, including the processes *Unlock Previously Scheduled Courses*, *How to Set the Next Year Grade Field for an Entire Grade Level*, *How to Schedule All of Next Year's Students*, and *How to Assign a Group of Students to a Building*.

Prepare to Build the Master Schedule

Preparing to build the master schedule is the first of several phases in creating a master schedule. The process of preparing to build the master schedule consists of the following 11 steps:

- *Schedule Security*
- *Scheduling Setup*
- *Build Scenarios Overview*
- *Courses*
- *Rooms Overview*
- *Student Information*
- *Student Course Requests*
- *Course Information*
- *Teacher Scheduling Information*
- *Build Constraints Overview*
- *Course Rank*

Most steps can be performed in any order, within reason. For example, you cannot enter teacher assignments if you have not entered all of your teachers on the teacher list. You also must define your schedule constraints before you calculate course rank.

To assign specific sections to several individuals, each person can perform a step at the same or different times. If you are the only person preparing to build your school's schedule, you should follow the steps in the above sequence.

Schedule Security

Once you know which groups at your school will be in charge of scheduling, you need to give members access to the Scheduling area. See *Schedule Security Setup*. For more information about general system security, see *Security*.

Schedule Security Setup

Give groups of users access to the scheduling functions in PowerSchool.

How to Give Groups Access to the Schedule Area

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.

3. Click the name of the group that contains your staff members, such as **Counselors**. The Edit Group page appears.
4. Select the **PowerScheduler Access** checkbox.
5. Click **Submit**. The Groups page appears.

Scheduling Setup

To build the master schedule to your school's specifications, you need to define pieces of information for the system to use to schedule courses at your school. These are called scheduling setup. Depending on your school's setup, not all scheduling setup need to be defined.

Define the following scheduling setup before building a master schedule:

- *Scenarios*
- *Auto. Scheduler Setup*
- *Course Catalogs*
- *Years and Terms*
- *Periods*
- *Days*
- *Buildings*
- *Departments*
- *Facilities*
- *Houses*
- *Section Types*
- *Teams*
- *Program Balancing*

Buildings

If your school campus contains several buildings, you can define each of them. Then, you can associate these buildings with students, teachers, and rooms. This way, the system knows to schedule courses in the appropriate building, taught by the appropriate teacher, and taken by the appropriate students.

How to Define a Building

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Buildings** from the PowerScheduler menu. The Buildings page appears.
3. Click **New**. The Add/Edit Building page appears.

4. Enter a name for the building in the Building field.
5. Click **Submit**. The Buildings page appears.

How to Edit a Building

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Buildings** from the PowerScheduler menu. The Buildings page appears.
3. Click the name of the building you want to edit. The Add/Edit Building page appears.
4. Edit the name of the building in the Building field.
5. Click **Submit**. The Buildings page appears.

How to Delete a Building

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Buildings** from the PowerScheduler menu. The Buildings page appears.
3. Click the name of the building you want to delete. The Add/Edit Building page appears.
4. Click **Delete**. The Buildings page appears.

Days

A day (or "cycle") is the number of repeating days that make up a schedule. The days are originally set up when you enter the number of days while creating the scenario or performing the Auto Scheduler Setup function.

To build a master schedule, PowerScheduler requires that days are defined. Prior to the start of the scheduling process, determine the numbers of days you will need in your schedule.

Note: A schedule day or cycle is NOT the same as a calendar day.

How to Define Days

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Days** from the PowerScheduler menu. The Edit Days page appears.
3. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the day.
Abbreviation	Enter an abbreviation for the day name.

4. Click **Submit**. The Changes Recorded page appears.

Departments

Courses, rooms, and teachers belong to departments. When building the master schedule, the system attempts to schedule courses in one of the rooms belonging to the appropriate department.

Use this function to set up departments. If you previously used PowerScheduler with departments, the departments also appear for this year.

Note: Be very careful to avoid typographical errors when defining departments. For example, if there is an existing SCIENCE department and you define a misspelled "SCEIENCE" department in PowerScheduler, the erroneously-named department will also exist when the schedule is committed since its name did not match the name of any existing department. It is a cumbersome task to clean up the data, as departments are associated to a number of tables, such as Teacher, Room, and Course.

How to Define a Department

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Departments** from the PowerScheduler menu. The Departments page displays the list of departments.
3. Click **New**. The Add/Edit Department page appears.
4. Enter a name for the department in the Department field.
5. Click **Submit**. The Departments page appears.

How to Edit a Department

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Departments** from the PowerScheduler menu. The Departments page appears.

3. Click the name of the department you want to edit. The Add/Edit Department page appears.
4. Edit the name of the department in the Department field.
5. Click **Submit**. The Departments page appears.

How to Delete a Department

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Departments** from the PowerScheduler menu. The Departments page appears.
3. Click the name of the department you want to delete. The Add/Edit Department page appears.
4. Click **Delete**. The Departments page appears.

Facilities

Some courses require special equipment or facilities. For example, a chemistry course requires special laboratory equipment, and a film course requires audio and video equipment. Also, a chemistry course is taught in a laboratory and a physical education class is taught in a gymnasium. To associate courses that need special equipment or types of rooms, the system uses facilities.

Note: You can assign multiple facilities to courses and rooms.

How to Define a Facility

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Facilities** from the PowerScheduler menu. The Facilities page appears.
3. Click **New**. The Add/Edit Facility page appears.
4. Enter a name for the facility in the Facility field.
5. Click **Submit**. The Facilities page appears.

How to Edit a Facility

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Facilities** from the PowerScheduler menu. The Facilities page appears.
3. Click the name of the facility you want to edit. The Add/Edit Facility page appears.

4. Edit the name of the facility in the Facility field.
5. Click **Submit**. The Facilities page appears.

How to Delete a Facility

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Facilities** from the PowerScheduler menu. The Facilities page appears.
3. Click the name of the facility you want to delete. The Add/Edit Facility page appears.
4. Click **Delete**. The Facilities page appears.

Houses

Some schools separate students into houses. For example, a school can have a House A (Grades 9 and 10) and a House B (Grades 11 and 12). Determine which rooms, teachers, and students belong to each house. If the "Use houses" checkbox is selected on the Edit Advanced Build Scenario page (see *How to Edit Advanced Optimizations*), the system references which house a room is assigned to before scheduling courses in that room and gives scheduling priority to the appropriate house.

Also, sections will be scheduled for houses based on the house assignment of the teachers scheduled for those sections. Students assigned to a house will be assigned to a section either without a house or with the same house, whereas students not assigned a house can be assigned to any section.

How to Define a House

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Houses** from the PowerScheduler menu. The Houses page appears.
3. Click **New**. The Add/Edit House page appears.
4. Enter a name for the house in the House field.
5. Click **Submit**. The Houses page appears.

How to Edit a House

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Houses** from the PowerScheduler menu. The Houses page appears.

3. Click the name of the house you want to edit. The Add/Edit House page appears.
4. Edit the name of the house in the House field.
5. Click **Submit**. The Houses page appears.

How to Delete a House

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Houses** from the PowerScheduler menu. The Houses page appears.
3. Click the name of the house you want to delete. The Add/Edit House page appears.
4. Click **Delete**. The Houses page appears.

Scheduling Periods

To build a master schedule, the system requires periods, which are generated when you create a scenario using the Auto Scheduler Setup process. Use this page to name and abbreviate those periods.

If you are working with a copy of a previous year's master schedule, the periods will be the same as they were in that schedule.

How to Define Periods

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Periods** from the PowerScheduler menu. The Edit Periods page appears.
3. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for this period.
Abbreviation	Enter an abbreviation for this period name.
Core	Select the checkboxes to specify the periods that are “core” periods in which you expect students to be scheduled. When PowerScheduler calculates the core percent scheduled figure, a

	calculation of successfully scheduled should consider core periods. By default, the checkbox is selected. Many schools define certain periods that are for other purposes than scheduling, such as a 0 period that may be used for daily attendance or night school periods. By identifying which periods are core periods, the system can base its decision of how successful a student's schedule is according to how many of the core periods have been scheduled.
Sort	Select a sort order for displaying this period.

4. Click **Submit**. The Changes Recorded page appears.

Section Types

Section types are special sections of a course. For example, your school might offer separate sections of courses for bilingual students. In this case, one section of the course will be identified as bilingual. The teacher who instructs this section will have a bilingual section type assignment. The students' requests will also reflect the bilingual section type.

How to Define a Section Type

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Section Types** from the PowerScheduler menu. The Section Types page appears.
3. Click **New**. The Add/Edit Section Types page appears.
4. Use the following table to enter information in the fields:

Field	Description
Section Type	Enter a name for the section type. Enter a maximum of 20 characters.
Section Type Code	Enter a section type code. Enter a maximum of 2 characters.

5. Click **Submit**. The Section Types page appears.

How to Edit a Section Type

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Section Types** from the PowerScheduler menu. The Section Types page appears.
3. Click the name of the section type you want to edit. The Add/Edit Section Types page appears.
4. Use the following table to edit information in the fields:

Field	Description
Section Type	Enter a name for the section type.
Section Type Code	Enter a section type code.

5. Click **Submit**. The Section Types page appears.

How to Delete a Section Type

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Section Types** from the PowerScheduler menu. The Section Types page appears.
3. Click the name of the section type you want to delete. The Add/Edit Section Types page appears.
4. Click **Delete**. The Section Types page appears.

Teams

Some schools, most often middle or junior high schools, assign students and teachers to teams to provide the best support and monitoring system.

Teams are either static or dynamic. If you define static teams, you manually assign each student to a particular team. For more information, see *Student Information*. If you create dynamic teams, you define the team names and assign teachers to the teams but allow the system to decide which students to assign to which teams for the best possible balance.

Note: For information about how to assign teachers to teams, see *Teacher Scheduling Information*.

The Teams page displays the team name and number. Use the team number to change the team for a group of students. For more information about updating a selection of students, see *Update Selections*.

How to Define a Team

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Teams** from the PowerScheduler menu. The Teams page appears.
3. Click **New**. The Edit Team page appears.
4. Enter a name for the team.
5. Click **Submit**. The Teams page appears.

How to Edit a Team

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Teams** from the PowerScheduler menu. The Teams page appears.
3. Click the name of the team you want to edit. The Edit Team page appears.
4. Edit the name of the team.
5. Click **Submit**. The Teams page appears.

How to Delete a Team

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Teams** from the PowerScheduler menu. The Teams page appears.
3. Click the name of the team you want to delete. The Edit Team page appears.
4. Click **Delete**. The Teams page appears.

Schedule Years and Terms

For scheduling purposes, you need to define the upcoming school year and its associated term, which are generated when you create a scenario using the Auto Scheduler Setup process.

Note: If you are working with a copy of a previous year's master schedule, the terms will remain the same as they are in that schedule.

It is important to enter the terms from largest to smallest. For example, create the school year first and then semesters 1 and 2, any trimesters, and any quarters.

How to Define a Schedule Year and Terms

Note: When creating a year, the corresponding registration records from the previous year are copied to the new year. If registration records already exist for the school and year, then the registration records are not copied. For more information about registration records, see *Student Course Request Pages*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Years & Terms** from the PowerScheduler menu. The Schedule Years & Terms page appears.
3. Click **New**. The Create New Schedule School Year page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name of School Year	Enter the name of the school year, such as 2008-2009.
Abbreviation	Enter an abbreviation for the school year, such as 08-09.
First Day of School	Enter the first day of school for this academic year in MM/DD/YYYY format, such as 09/02/2009.
Last Day of School	Enter the last day of school for this academic year in MM/DD/YYYY format, such as 6/5/2010.

5. Click **Submit**. The Schedule Years & Terms page displays the schedule year.
6. Click **Edit Terms** in the row of the appropriate schedule year.
7. On the Term Setup page, click **New**. The Edit Schedule Term page appears.

   Note: Enter the terms sequentially. That is, if your school has terms of two semesters and four quarters, enter them in this order: Year, Semester 1, Semester 2, and then Quarter 1, Quarter 2, Quarter 3, and Quarter 4.

8. Use the following table to enter information in the fields:

Field	Description
Name of Term	Enter the name of this term, such as Semester 1.
Abbreviation	Enter an abbreviation for this term, starting with a letter, such as S1.
First Day of Term	Enter the first day of this term in MM/DD/YYYY format.
Last Day of Term	Enter the last day of this term in MM/DD/YYYY format.
What portion of the school year does this term represent?	Use the pop-up menu to choose the fraction that this term represents within the school year. If your school year consists of four terms, choose **1/2**. If this term represents the whole school year, choose **Full year**.
Import File Term #	Enter an import file term number so that the system can align terms when it imports the master schedule. For example, if your school uses semester and quarter classes, you might state in the import file that all sections of S1 are identified by the number S10203. Enter the same number in this field to map the date.

9. Click **Submit**. The Term Setup page appears.

How to Edit a Schedule Year

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Years & Terms** from the PowerScheduler menu. The Schedule Years & Terms page appears.
3. Click the name of the schedule year you want to edit, such as **Full Year** or **2008-2009 School Year**. The Edit Schedule School Year page appears.
4. Use the following table to edit information in the fields:

Field	Description

Name of School Year	Enter the name of the school year, such as 2008-2009.
Abbreviation	Enter an abbreviation for the school year, such as 08-09.
First Day of School	Enter the first day of school for this academic year in MM/DD/YYYY format, such as 09/02/2008.
Last Day of School	Enter the last day of school for this academic year in MM/DD/YYYY format, such as 6/5/2009.

5. Click **Submit**. The Schedule Years & Terms page appears.

How to Edit a Schedule Term

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Years & Terms** from the PowerScheduler menu. The Schedule Years & Terms page appears.
3. Click **Edit Terms** in the row of the appropriate schedule year. The Term Setup page appears.
4. Click the name of the term you want to edit. The Edit Schedule Term page appears.
5. Use the following table to edit information in the fields:

Field	Description
Name of Term	Enter the name of this term.
Abbreviation	Enter an abbreviation for this term, starting with a letter, such as S1. Enter no more than six characters.
First Day of Term	Enter the first day of this term.
Last Day of Term	Enter the last day of this term.

What portion of the school year does this term represent?	Use the pop-up menu to choose the fraction that this term represents within the school year. If this term represents the whole school year, choose **Full year**.
Import File Term #	Enter an import file term number so that the system can align terms when it imports the master schedule. For example, if your school uses semester and quarter classes, you might state in the import file that all sections of S1 are identified by the number S10203. Enter the same number in this field to map the date.

6. Click **Submit**. The Term Setup page appears.

How to Delete a Schedule Term

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Years & Terms** from the PowerScheduler menu. The Schedule Years & Terms page appears.
3. Click **Edit Terms** in the row of the appropriate schedule year. The Term Setup page appears.
4. Click the name of the schedule term you want to delete. The Edit Schedule Term page appears.
5. Click **Delete**. The Term Setup page appears.

How to Delete a Schedule Year

Note: When deleting a year, the corresponding registration records are also deleted. For more information about registration records, see *Student Course Request Pages*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Years & Terms** from the PowerScheduler menu. The Schedule Years & Terms page appears.
3. Click **Edit Terms** in the row of the appropriate schedule year. The Term Setup page appears.
4. Click the name of the schedule year you want to delete. The Edit Schedule Term page appears.
5. Click **Delete**. The Schedule Years & Terms page appears.

Program Balancing

If enabled, Program Balancing allows PowerScheduler to evenly balance students in programs across sections during PowerScheduler loads and Automated Walk-In Scheduling. Program Balancing uses the new server-side engine loader, which removes the need to run the client scheduling engine on client machines, provides program balancing, and optimizes processing for faster and better results. To enable, see *How to Define Scheduling Preferences*. Once enabled, you will need to define which programs you want to include in balancing.

How to Define Program Balancing

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Program Balancing** from the PowerScheduler menu. The Program Balancing page appears.
3. Use the following table to enter information in the fields:

Field	Description
Balance These Programs	Select the checkbox next to each program you want included in balancing.
Evaluate Programs as of This Date	Enter the date from which you want the Scheduling Engine to evaluate special programs or click the **Calendar** icon to select a date.

4. Click **Submit**. A confirmation message appears.

Build Scenarios Overview

A build scenario includes the parameters that PowerScheduler references to create a master schedule for the upcoming school year. Use scenarios to work with different combinations of criteria before committing a master schedule. After completing a successful build for a scenario, you can duplicate it and try various modifications to the original scenario.

Though you can create multiple build scenarios, it is suggested that you start with just one. Multiple scenarios may be useful when, for example, your school wants to hire an additional computer science teacher to meet student course request demands. In this case, create two build scenarios: one that includes the additional computer science teacher and one that does not. Present both scenarios to the school committee to make a final decision on which situation would work best.

Some information used to create a master schedule is shared amongst all scenarios, whereas other information is defined per scenario. The following data is exclusive to a particular build scenario:

- Master schedule
- Student schedules
- Constraints
- Course rank
- Teacher assignments
- Course relationships

For example, if you define the constraint that Mrs. Smith must be free first period for the Schedule 1 scenario, the Schedule 2 scenario does not adhere to that constraint.

The following information is shared by all build scenarios that you create for a given build year:

- Students
- Student course requests
- Student course request pages
- Teachers
- Rooms
- All parameters (such as terms)
- Course groups

For example, if you enter a student course request, the system tries to schedule that request in all scenarios.

For more information about build scenarios, including how to create a build scenario, see *Build Scenarios*.

Build Scenarios

Before creating build scenarios, define the basic build information, such as the number of terms, days, and periods in your master schedule. Then, define optimization parameters, which determine how long the system spends scheduling each course, section, and student.

When building the master schedule, PowerSchool evaluates every possible schedule combination before it adds a course to that schedule. Depending on your school's courses, constraints, and other schedule parameters, there could be millions of ways to schedule one multi-section course. Evaluating all of these schedule combinations would take many hours. You might not want to wait for such a thorough evaluation. If this is the case, define build and load optimizations to determine how many combinations the system should review when building your schedule.

When you enter optimization parameters, you define the minimum and maximum number of possibilities the system should evaluate while doing the following:

- Building the master schedule
- Loading student schedules with courses

You can also define best schedule weights to determine how the system handles conflicts when building your master schedule. For example, if you give more weight to section balance than to student conflicts, the system tries to create similar-size course sections before it tries to accommodate student course requests. Based on the last load for each scenario, the percent of students scheduled, core courses scheduled, and satisfied student requests appear on the Scenarios page.

How to Create a Build Scenario

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Scenarios** from the PowerScheduler menu. The Scenarios page appears.
3. Click **New**. The Edit Build Scenario page appears.
4. Use the following table to enter information in the Build Information fields:

Field	Description
[Scenario type]	Select the **Build and Load** option to build a schedule and then load students into that schedule. **Note:** If creating a **Load Only** scenario, see *Load Process: Schedule Setup*.
Build Name	Enter a name for this build scenario. If you are creating several scenarios, use descriptive names so that you can easily distinguish among them.
Active Build	If you are creating only one build scenario, select the checkbox. If you are creating more than one build scenario, select the

	checkbox for the one you want the system to use to build your master schedule. **Note:** You will only be able to edit the course catalog that is associated with the build marked as active.
Build Description	Enter a description of this scenario.
Terms	Click **Associate** to select the number of schedule terms you want this scenario to include. The Schedule Term Setup page appears. 1. Select the checkboxes in the rows that represent the number of schedule terms you want this scenario to include. For example, if you plan to build a two-semester master schedule, select the checkbox next to the row that includes Semester 1 and Semester 2. 2. Click **Submit**.
Periods	From the pop-up menu, choose the number of periods per day for this build scenario. For example, if you are building a block schedule, you might choose 4. If you are building a regular schedule, you might choose 7.
Days	Choose from the pop-up menu the number of days for this build scenario.
Course Catalog	Use the pop-up menu to choose the course catalog you want the system to use to build this schedule. If this is your first time creating a master schedule, do not select a catalog. The system will automatically generate a course catalog, which you can modify. For more information, see *Course Catalogs*.

5. Use the following table to enter information in the Build Optimizations and Load Optimizations fields:

Field	**Description**

Percent of schedule combinations to evaluate for each course	Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. The default value of this field is 10. For example, if you enter **25**, the system evaluates one-quarter of the possible schedule combinations for each course. If you enter **75**, the system evaluates three-quarters of the possible schedule combinations for each course.
Minimum number of schedule combinations to evaluate for each course	Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. The default value of this field is 10,000. For courses with few possible combinations to begin with, use a higher number to prevent the system from attempting too few schedule combinations and not being able to fit the course into the schedule.
Percent of schedule combinations to evaluate for each student	Change this value only if you encounter problems with the amount of time the system is using to load the master schedule. The default value of this field is 10. For example, if you enter **25**, the system evaluates one-quarter of the possible schedule combinations for each student. If you enter **75**, the system evaluates three-quarters of the possible schedule combinations for each student.
Minimum number of schedule combinations to evaluate before skipping	Change this value only if you encounter problems with the amount of time the system is using to load the master schedule. The default value of this field is 10,000. Enter a high number to force the system to sample a minimum number of student schedule course possibilities.

Note: You can also set build optimizations for a particular course by adding a Course Optimize constraint. This type of constraint takes precedence over the build optimizations you set here. For more information, see *Build Constraints*.

6. Use the following table to enter information in the Best Schedule Weights fields:

Field	**Description**

Student conflicts	To have the system give more weight to student conflicts than section balance when confronted with a conflict while building the master schedule, enter a larger number in this field than in the Section balance field. The default value of this field is 50. **Note:** The numbers in both of these fields must add up to 100.
Section balance	To have the system give more weight to section balance than student conflicts when confronted with a conflict while building the master schedule, enter a larger number in this field than in the Student conflicts field. The default value of this field is 50. **Note:** The numbers in both of these fields must add up to 100.
Total	The total of the weighting values appears. This number must be 100.

7. Click **Submit**. The Scenarios page appears.

How to Edit Advanced Optimizations

In addition to the build and load optimization fields on the Edit Build Scenario page, there are a number of more advanced optimizations. Edit these fields only if you encounter problems while building your master schedule or loading student schedules.

Note: If you are able to run a successful build and load students into schedules satisfactorily, do not edit the Advanced Optimization fields.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Scenarios** from the PowerScheduler menu. The Scenarios page appears.
3. Click **Edit** in the Advanced column of the appropriate build scenario. The Edit Advanced Build Scenario page appears.
4. Use the following table to enter information in the fields:

Field	Description

Use dynamic student load on all combinations until (n) sections	The default value of this field is 4, meaning that if a course has up to four sections, the system will score those sections precisely when loading students. If you enter a **5** or greater in this field, the system will score courses with five or more sections less precisely but faster.
Random number seed value	Change this value only to make sure the randomization function is working. The default value of this field is 123.
Use buildings	Select the checkbox if this scenario uses buildings.
Use houses	Select the checkbox if this scenario uses houses.
Swap rooms after building each course	Sometimes it is not possible to schedule a teacher in his or her preferred room. Select the checkbox so that the system will try to swap rooms as soon as a conflict arises. The checkbox is selected by default. If you deselect the checkbox, the system will not try to swap rooms during the scheduling process. After the schedule has been built, you can manually make adjustments.
Use swap rooms on prebuilt sections and preschedule constraints	Select the checkbox to allow room exchanges. For example, assume you reviewed the master schedule that is being built and made some room changes. Then, if you restarted the build, you would not want to allow the system to swap rooms, possibly eliminating these changes. In this case, do not select the checkbox. The checkbox is deselected by default.
Calculate future assignments for better combinations	Select the checkbox to ensure that the system will take the time to make sure course assignment decisions made now are smart ones. The checkbox is selected by default. **Note:** Because this process can be extremely time-consuming, you have the option of adjusting the amount of time the system spends on future assignments.

Percent of future assignments to calculate after teacher is scheduled	Use this field to fine-tune the amount of time the system spends scheduling each teacher. Enter a number that represents what percent of time a teacher will already be scheduled before the system starts calculating future assignments for him or her. **Note:** The higher the number you enter, the faster the system will calculate and the greater the chance that this teacher will encounter scheduling difficulties.
Maximum time to spend on future assignments	If you find in the log that the computer runs out of time when calculating future assignments, you may need to increase this value. The default value of this field is .1 second.
Maximum memory allowed for teacher assignment optimization	If your computer has a great deal of memory, you could increase this value, which might make the system run faster. The default value of this field is 2 MB.
Maximum time to spend on teacher assignments sort optimization	The order in which the system selects teachers to schedule is very useful; however, leaving the default value ensures that the system is never going to spend an excessive amount of time determining this order. The default value of this field is .25 seconds.
Maximum repeat count for validation error messages	This setting minimizes the number of repeated error messages from the system. For example, if you forget to enable an entire grade of students for scheduling, this setting limits the number of invalid request messages that are returned. The default value of this field is 25.
Section type handling	Choose **Strict** from the pop-up menu to not allow the system to schedule a student into a section of a course if he or she had not requested that section type.

5. Click **Submit**. The Changes Recorded page appears.

How to Delete a Build Scenario

Deleting a build scenario also deletes the following items associated with this build: master schedule, student schedules, teacher assignments, constraints, and course relationships.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Scenarios** from the PowerScheduler menu. The Scenarios page appears.
3. Click the name of the build scenario you want to delete. The Edit Build Scenario page appears.
4. Click **Delete**. The Delete Scenario page appears.
5. Select the checkbox if you are sure you want to delete this build scenario.
6. Click **Submit**. The Scenarios page appears.

Auto Scheduler Setup

The Auto Scheduler Setup function is intended to give you a head-start when creating scenarios. After you enter basic information related to days, periods, and terms on the Auto Scheduler Setup page, PowerScheduler populates those fields for a scenario. That way, you do not need to set up days, periods, and terms on their respective setup pages; instead, those field defaults can be set using Auto Scheduler Setup.

You will be guided through several pages when using the Auto Scheduler Setup function. As you navigate through the setup screens, it is important to note that no information is saved to PowerScheduler until you submit the Build Scenario.

How to Run the Auto Scheduler Setup Function

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Auto Scheduler Setup** from the PowerScheduler menu. The Auto Scheduler Setup page appears.
3. Use the following table to enter information in the fields:

Field	Description
Lowest term level division	Use the pop-up menu to choose the smallest fraction of terms that the school uses. For example, if the school uses quarters and semesters, select **Quarters** from the pop-up menu.

Number of periods	Use the pop-up menu to choose the number of periods that the school uses. For example, if the school currently uses or would like to create a seven period schedule, select **7**.
Number of days	Use the pop-up menu to choose the number of days that the school uses. For example, if the school currently uses or would like to create a schedule using A and B days, select **2**.

4. Click **Continue**. The Automatic Schedule Setup - Schedule Term Selection page appears.
5. Select the checkbox next to the full year term and the term levels that will be used for scheduling. For example, if you offer semester courses, select the checkboxes next to **Full Year** and **Semester - Semester**.

   Note: You must select the **Full Year** checkbox.

6. Click **Continue**. The Automatic Schedule Setup - Define Term Dates page appears.
7. Enter the first and last days of each term, using the format mm/dd/yyyy or mm-dd-yyyy.
8. Click **Continue**. The Edit Build Scenario page appears.
9. Click **Submit**. The Scenarios page appears.

   Note: For more information about creating or editing a build scenario, see *Build Scenarios*.

Auto Create and Fill Scheduling Information

When preparing to build a master schedule, you need to enter information related to rooms, students, courses, and teachers. Though each of these records can be created individually, PowerScheduler can automatically create this information to improve efficiency.

How to Auto Create Rooms

Though you can still build rooms individually, you may also create them all at once. For example, enter for each department the room start number, increment number, number of rooms, department, facilities, and room maximum. The system generates the list of rooms.

Note: The Auto Generate Rooms function creates rooms from an existing master schedule.

Once the list is created, you can go back to each room and modify names and other information.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions**. The Scheduling Functions page appears.
3. Click **Auto Create Rooms**. The Auto-Create Rooms page appears.
4. Use the following table to enter information in the fields:

Field	Description
Start Number	Enter the starting number for the room numbers.
Increment Number	Enter the value by which the room numbers increase from the starting number.
Number of Rooms	Enter the number of rooms that should be created.
Room Prefix	Enter a prefix for the room numbers (optional). This value can be alpha or numeric and will concatenate with room start number. For example, entering the prefix MA creates the room number MA23 for the math room 23.
Department	Click **Associate** to select the department for these rooms. Associating a room to a department does not limit the room to that department. To do this, see the field Department Use Only.
Building	Click **Associate** to select the building for these rooms (optional).
House	Click **Associate** to select the house for these rooms (optional).
Use for Scheduling	Select either **Yes** or **No** from the pop-up menu to indicate if these rooms should be used for scheduling purposes.
Room is Always Free	Select either **Yes** or **No** from the pop-up menu to indicate if these rooms are always free.

Department Use Only	Select either **Yes** or **No** from the pop-up menu to indicate if these rooms are to be used only by the associated department.
Facility Use Only	Select either **Yes** or **No** from the pop-up menu to indicate if these rooms are used for certain facilities, such as lab rooms.
Room Facilities	If you selected **Yes** for the Facility Use Only field, click **Associate** to select the facility or facilities for this room.
Room Maximum	Enter the maximum number of seats for this room.

5. Click **Submit**. The Rooms page appears. For more information about modifying room information, see *How to Edit a Room*.

How to Auto Fill Student Information

Use this function to fill in student information simultaneously for selected students. Student information that can be automatically filled includes next year grade, priority, and year of graduation.

You can set the next school indicator for all students before using this function, and you must set the next year grade indicator for returning twelfth graders before using this function. For more information, see *Next School Indicator*.

Note: The grade level entered affects all students for the grade level column selected whose next school indicator is set for the school submitting the information.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions**. The Scheduling Functions page appears.
3. Click **Auto Fill Student Information**. The Auto-Fill Student Info page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Next Year Grade	For each column, enter the next year grade to indicate which students' information to change. For example, enter 12 for eleventh graders who will be in the twelfth grade next year, and enter 12 in the next column for any returning twelfth graders.

Priority	Enter the scheduling priority for the students. For example, enter 1 for returning twelfth graders who need to be scheduled first, and enter a higher number for incoming ninth graders.
Schedule This Student	Select either **Yes** or **No** to indicate if the students in each column should be scheduled or not.
Year of Graduation	Enter the year of graduation to indicate in which school year the student will graduate. For example, enter **2009** for twelfth graders graduating at the end of the 2008-2009 school year.

5. Click **Submit**. The Auto-Fill Student Info page appears.

How to Auto Fill Course Information

Use this function to fill in course information simultaneously for selected courses. To automatically update course information, select courses (for example, by department) using the Update Selections function. For more information, see *Update Selections*.

When entering course information, use the pop-up menus to select No Change, Yes, or No for certain fields. All pop-up menus will have No Change as the default option. For entry fields, leave a field blank to not update existing course information. To clear any values in field, either enter 0 or select the Clear Value checkbox.

You can edit each course to enter individual information, such as facilities. When you edit a course, you cannot edit the Terms Per Year field unless you change the valid terms on the course page. If you use the Update Selections function to change the terms, this recalculation does not automatically occur; in that case, you must also use the Update Selections function to change the terms per year.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions**. The Scheduling Functions page appears.
3. Click **Auto Fill Course Information**. The Auto-Fill Course Info page appears.
4. Use the following table to enter information in the fields:

Field	**Description**

Apply To	Choose whether you want to apply the changes to all courses in the active catalog or only to the selected courses. By default, changes are only applied to the selected courses.
Schedule This Course	Choose **Yes** from the pop-up menu to indicate that these courses should be scheduled. Choose **No** to indicate that these courses should not be scheduled. Choose **No Change** to not affect the scheduling statuses of these courses.
Department	Click **Associate** to select the department for these courses. Select the **Clear Value** checkbox to remove department information for the selected courses.
Build Type	Build types define the shape of a course. Use the pop-up menu to select either **No Change** or one of the following options: • **Standard**: This course meets for the same number of periods every time it meets. For example, a course that meets every day for one period is standard, and a course that meets for one period every other day is also standard. • **Lab**: This is a standard course that meets for the same number of consecutive extra periods on certain days in the cycle. For example, a standard Chemistry course meets every day in a six-day cycle (Days A-F). Two days in the cycle, the class meets for two consecutive periods to complete an involved laboratory assignment. • **LabFloat**: This is a standard course that meets extra periods some days in the cycle, but the extra period is not consecutive to the course. For example, a Humanities course meets every day in a six-day cycle. One day during the cycle, the students attend a two-period lab in which they complete a community service assignment. The community service assignment does not have to occur directly before or after the Humanities course.
Maximum Enrollment	Enter the maximum number of students you want to schedule in sections of each course.

Target Number of Sections to Offer	Enter the number of sections to offer for each course. **Note:** To calculate this number manually, see *How to Define Scheduling Preferences*.
Number of Teacher Assignments	Enter the number of teacher assignments for each course. For example, if the school decides to offer four sections of Algebra, the engine requires that four teacher assignments are defined. As a result, Teacher A will have an assignment for one section, Teacher B will have an assignment for two sections, and Teacher C will have an assignment for one sections, totaling four teacher assignments. This tells the Scheduling Engine that four sections of Algebra must be built, and also tells the Engine who must teach those sections. **Note:** Only Build and Load scenarios allow for teacher assignments. Teacher assignments are not used by Load Only scenarios.
Frequency	Enter the number of times each course will meet per cycle.
Periods Per Meeting	Enter the number of periods each course will meet per day.
Lab Frequency	Enter the number of times each lab will meet per cycle.
Lab Periods Per Meeting	Enter the number of periods each lab will meet per day.
Repeats in Same Term	Choose **Yes** from the pop-up menu to indicate that these courses are offered more than once in the same term. Choose **No** to indicate that these courses should not be offered more than once in the same term. Choose **No Change** to not affect the scheduling statuses of these courses. **Note:** This setting does not affect the Repeats in Different Terms setting.
Repeats in Different Terms	Choose **Yes** from the pop-up menu to indicate that these courses can be offered more than once in different terms. Choose **No** to

	indicate that these courses cannot be offered more than once in different terms. Choose **No Change** to not affect the scheduling statuses of these courses. **Note:** This setting does not affect the Repeats in Same Terms setting.
Balance Terms	If the Repeats in Different Terms option is selected, use this pop-up menu to indicate if these courses should be offered evenly across all terms. For example, if a course is offered for three trimesters and you do not indicate that the terms should be balanced, the course could be offered twice in the first trimester, once in the second trimester, and not at all in the third.
Valid Start Periods	Select the checkboxes for the periods in which these courses can be offered. For example, a marching band course may always meet during the last period of the day. Select the **Clear Value** checkbox to remove valid start period information for the selected courses.
Valid Terms	Click **Associate** to select in which terms these courses are offered. Select the **Clear Value** checkbox to remove valid term information for the selected courses.
Facilities	Click **Associate** to select which facilities these courses use. Select the **Clear Value** checkbox to remove facility information for the selected courses.
Load Priority	Enter a load priority for these courses. The lower the number, the higher the priority during the load process.
Load Type	Use the pop-up menu to select the type of course for these courses: • **Academic** • **Elective**

Balance Priority	Use the pop-up menu to select the type of priority that should be used when loading these courses. • Section • Gender • Grade • Ethnic Code • House
Use Teams	Use the pop-up menu to indicate if these courses should be scheduled by associated teams.
Close at Max	Use the pop-up menu to indicate if these courses should close when enrollment reaches the maximum number of students specified in the Maximum Enrollment field.
Use Section Types	Use the pop-up menu to indicate if these courses should be scheduled by associated section types.
Don't Allow Substitutions	Use the pop-up menu to indicate if students should be scheduled in alternate courses.

5. Click **Submit**. The Changes Recorded page appears.

How to Auto Fill Teacher Information

Use this function to fill in teacher information simultaneously for selected teachers. To automatically update teacher information, select teachers using the Update Selections function. For more information about this function, see *Update Selections*.

When entering teacher information, use the pop-up menus to select No Change, Yes, or No for certain fields. All pop-up menus will have No Change as the default option. For entry fields, leave a field blank to not update existing teacher information. To clear any values in field, either enter 0 or select the Clear Value or Clear Room checkbox.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions**. The Scheduling Functions page appears.
3. Click **Auto Fill Teacher Information**. The Auto-Fill Teacher Info page displays.

4. Use the following table to enter information in the fields:

Field	Description
Apply To	Choose whether you want to apply the changes to all teachers who are ready to schedule or to the selected teachers only.
Department	Click **Associate** to select the department for these teachers. Select the **Clear Value** checkbox to remove any existing values in this field.
Preferred Room	Click **Associate** to select the room these teachers prefer. Select the **Clear Room** checkbox to remove any existing values in this field.
Maximum Consecutive Periods	Enter the maximum number of periods these teachers can teach in a row.
Schedule for Lunch	Select the checkbox if you want these teachers to be scheduled for a lunch period. For more information, see *Scheduled Lunch*.
Schedule This Teacher	Select either **Yes** or **No** to indicate if these teachers should be scheduled or not.
Is Always Free?	Select either **Yes** or **No** to indicate if these teachers are always free.

5. Click **Submit**. The Changes Recorded page appears.

Courses

To work with the courses that will be part of next year's schedule, you must first add any new courses you plan to offer and associate them with your school. See *New Courses*. Then, create a course catalog to make course selections available for student course requests. After creating a course catalog, you can edit or delete that catalog, depending on your needs. See *Course Catalogs*.

Note: It is possible for students to request a course that is not part of your course catalog if that course has been associated with your school.

Course relationships have consequences for how you manage new and modified courses. First, it is important to understand the ways to view courses and how those views are connected:

1. Course List (Start Page > District or School > Courses). This page lists all courses on the server and is the central point from which you can manage courses and course-related information at both the district and school level.
2. Available Courses for [Year] List (Start Page > School > Courses > Manage courses for this school). This page lists all courses on the server and is used to create new courses, as well as to make them active or inactive for the current school.
3. PowerScheduler Course Catalog (Start Page > PowerScheduler > Catalogs > Edit). This list matches what is listed on the PowerSchool School Course List. Indicate for each course if it is active for scheduling. When you submit this information, a new record is created for the course in a different table in PowerSchool's database. At that point, changes to courses listed in PowerSchool do not affect courses listed in PowerScheduler.
4. PowerScheduler School Course List (Start Page > PowerScheduler > Courses). This list includes the selected courses from the Scheduling Course Catalog. Selecting courses to be scheduled does not affect this list of courses.

In summary, view 4 is based on the selected courses of view 3, which, like view 2, is based on the selected courses of view 1. This means that to add a course to PowerScheduler, you must first add a course to the Available Courses for [Year] List (view 1). Then, in the Scheduling Course Catalog, select the checkbox next to the course and submit.

To change a course name but use same course number, there are two options. The first takes more thought but is easiest, whereas the second requires someone with the highest level of access to the database to make changes for you. Regardless of the option you choose, the current courses should not be modified at all if any of them are in use this school year by any school on the server. It is necessary to store grades using the courses' current names. Do not modify course names until you complete all necessary processes at the end of the school year. Also, changes made in PowerScheduler are void when you complete your master schedule and are ready to commit student schedules because the master schedule references courses in PowerSchool.

To change a course name but use same course number:

- Option 1: Leave everything as is and schedule using the old course name. After the end of the school year, change the course's name. This takes more thought because you must remember that you need to change the name at the end of the school year. Since you must change the course name regardless of which option you choose, no extra work is required.

- Option 2: Use DDA to search the SchedCourseCatalogs table for the course number. Be sure to search only within records belonging to your school and make a backup of your data file before proceeding. Then, change the course name. This affects the course name in PowerScheduler.

New Courses

Add any new courses before building or loading a master schedule.

Note: You cannot add a new course to your course list in PowerSchool's Scheduling area.

How to Add a New Course to the Course List (District)

Use the following procedure to create a new course. Once a course is created, it is available and active for both student course requests and inclusion in your course catalog for the selected schools and years.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. If the **New Courses** button does not appear on the page, then the district may only allow new courses to be created at the district office. For more information, see *How to Edit Course Settings*.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. Click **New Course**. The Create New Course page appears.
4. Use the following table to enter information in the fields:

Field	Description
Course Name	Enter the name of the course.
Course Number	Enter the number that will be used to identify this course.
Alternate Course Number	Enter an alternate course number if your school uses this field for state reporting or district purposes.

Associate Course with Schools	Indicate which schools you want this course to be made available to by doing one of the following: • To select a single school, click each school you want to associate. • To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. **Note:** By default all schools are selected. **Note:** This field only appears at the district level. If creating a new course at the school level, the new course is automatically associated only to the selected school.
Available School Years	Indicate which school years you want this course to be made available by doing one of the following: • To select a single year, click each year you want to associate. • To select multiple years, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each year. **Note:** By default all current and future years are selected.
Credit Hours	Enter the number of credits a student receives for taking this course.
CIP Code	In some states, schools use CIP codes to identify courses as part of a state-managed vocational program. Enter this code, if applicable.
Vocational Class	Select the checkbox if this is a vocational course.
Credit Type	Enter the type of credit a student receives for passing this course, such as **MATH**, **ENG**, or **FINE**. You can then apply this credit to a graduation type.
Default Maximum Enrollment	Enter the maximum number of students that can be enrolled in this course.

Courses Notes	Enter descriptive text regarding the course or course enrollment, if any.
Grade Scale	Choose the grade scale from the pop-up menu. For more information, see *How to Assign Grade Scales to Courses*.
GPA Added Value Points	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values.
Exclude from GPA?	Select the option to either include or exclude the grade from the GPA calculation.
Exclude from Class Rank?	Select the option to either include or exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Select the option to either include or exclude the grade from the honor roll calculation.
Use the Course for Lunch	Select the checkbox to indicate that this course will be used exclusively for scheduled lunches. Otherwise, deselect the checkbox. **Note:** For more information, see *Scheduled Lunch*.
Exclude on Report Cards/Transcripts	Select the checkbox to exclude all sections of this course from appearing on the schedule listing of Report Cards or the Transcript Object of Object reports. Otherwise, leave blank.

5. Click **Submit**. The new course appears on the Courses page.

How to Add a New Course to the Course List

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. The Courses page appears.
3. Choose **Manage courses for this school**. The Available Courses for [Year] page appears.

4. Click **New**. The Create New Course page appears.
5. Enter information as needed. For detailed information, see *How to Add a New Course to the Course List*.
6. Click **Submit**. The new course appears on the Courses page.

Course Catalogs

Create the list of courses that your school will offer during the next school year. This list is referred to as the course catalog.

Courses in the course catalog are copied from the district level. Not all courses on the district course list are available for the catalog; only courses that appear on the school's Available Courses for [Year] page can be included. For more information, see *How to Edit Course Status*.

You can edit information in the course catalog without affecting the courses on the school's Available Courses for [Year] page. For example, you may want to change the credit hours for a course for scheduling purposes but revert to the course's real credit hours when committing schedules for the next school year. Once a master schedule is committed, the course information, including credit hours, is retrieved from the district level.

Note: You can have more than one course catalog, and it is not necessary to create a new catalog for each scheduling year. Course catalogs are associated with builds, and a catalog is only active when it is associated with the active build scenario. This also means that you can only edit courses in the catalog that is active. For more information, see *Build Scenarios*.

Note: When navigating through the course catalog pages, you may see a warning icon next to the **Courses Catalog** and the **Edit Course Catalog** links. The warning icon indicates there are unavailable courses related to the course catalog of the active build scenario.

How to Create a Course Catalog

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Course Catalogs** from the PowerScheduler menu. The Catalogs page appears.
3. Click **New**. The New Course Catalog page appears.
4. Use the following table to enter information in the fields:

Field	Description

Name	Enter a name for this catalog. For example, if you are creating the course catalog for a specific school year, you might call it **2008-2009**.
Description	Enter a description of the catalog. Enter no more than 80 characters in this field.

5. Click **Submit**. The new catalog appears on the Catalogs page.
6. Click **Edit Course Catalog** in the row of the catalog you created. The Course Catalog page appears.

   Note: If "Not active catalog" appears in the Edit Catalog column instead of "Edit Course Catalog," you must first make the new catalog the active catalog. Edit the current build scenario so that the new catalog is the active catalog. For more information, see *Build Scenarios*.

7. Deselect the checkbox next to each course you want to remove from this course catalog. By default, the checkboxes next to all of the courses available for scheduling at your school are selected. To sort the list, click **Course Name**, **Course Number**, or **Active Status**, which sorts the active (selected) courses first and the inactive (deselected) courses last.

   Note: Deselecting a course means that you will not be able to schedule that course for the upcoming schedule year, even if you have student course requests associated with it. Any student course requests will be automatically dropped from the scheduling process.

8. Click **Submit**. The Catalogs page appears.

   Note: You can edit the scheduling information for any of the courses within your active course catalog by clicking **Edit** in the Courses row. For more information, see *Build Scenarios*.

How to Edit a Course Catalog

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Course Catalogs** from the PowerScheduler menu. The Catalogs page appears.

3. Click the name of the catalog you want to edit. The Edit Course Catalog page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for this catalog. For example, if you are creating the course catalog for a specific school year, you might call it **2008-2009**.
Description	Enter a description of the catalog. Enter no more than 80 characters in this field.

5. Click **Submit**. The Catalogs page appears.

How to Edit Available Courses in the Course Catalog

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Course Catalogs** from the PowerScheduler menu. The Catalogs page appears.
3. Click **Edit Course Catalog**. The Course Catalog page appears.
4. Use the following table to enter information in the fields:

Field	Description
[Text]	The following informational text appears on the page: • This page lists courses in the course catalog (selected), as well as all available courses for this school and scheduling year not in the catalog (deselected). • To add or remove a course from the catalog, select or deselect the checkbox and click Submit. • Courses listed in black bold are available and active for live scheduling at this school for the designated scheduling year. • Warning icons indicate courses that are in the catalog, but not available for live scheduling at this school for the

	designated scheduling year. These courses must be made available in order to commit them in live schedules, and if not, should be removed from the course catalog after removing any related data in PowerScheduler. Examples of related data includes sections, class enrollments, teacher assignments, teacher recommendations, course requests, constraints, and course relationships. • If the district allows schools to change course availability, to edit availability for courses, use the Edit Availability for Schools and Years district level function, the Availability tab on the Course Edit page, or the Unavailable tab on the Courses for [year-year] page. • If the district does not allow schools to change course availability, to edit availability for courses, use the Edit Availability for Schools and Years district level function or the Availability tab on the Course Edit page at the district level. • To view all unavailable courses, go to the **Unavailable Courses** page.
Sort List By	Sort courses in the course catalog by clicking **Course Name**, **Course Number**, or **Active Status**.
[Course]	Do one of the following: • Select the checkbox next to each course you want to include in the course catalog. • Deselect the checkbox next to each course you want to remove from the course catalog.

5. Click **Submit**. The Catalogs page appears.

How to Edit Unavailable Courses in the Course Catalog

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Course Catalogs** from the PowerScheduler menu. The Catalogs page appears.
3. Click **Edit Course Catalog**. The Course Catalog page appears.

4. Click **Unavailable Courses.** The Unavailable Courses page displays all courses that are unavailable for the selected school and scheduling year.
5. Use the following table to enter information in the fields:

Field	Description
[Text]	The following informational text appears on the page: • This page lists all courses that are unavailable for the selected school and scheduling year. • Only available courses can be committed to the live side schedule. • Unavailable courses should only be included in the catalog if they will be made available prior to committing the schedule, or for the purpose of temporarily accessing them within PowerScheduler to remove related data. Examples of related data includes sections, class enrollments, teacher assignments, teacher recommendations, course requests, constraints, and course relationships. • To add or remove a course from the catalog, select or deselect the checkbox and click Submit. • If the district allows schools to change course availability, to edit availability for courses, use the Edit Availability for Schools and Years district level function, the Availability tab on the Course Edit page, or the Unavailable tab on the Courses for [year-year] page. • If the district does not allow schools to change course availability, to edit availability for courses, use the Edit Availability for Schools and Years district level function or the Availability tab on the Course Edit page at the district level. • To view all courses included in the course catalog, along with additional courses available for this school and scheduling year, select **View School Courses**.
Sort List By	Sort courses in the course catalog by clicking **Course Name** or **Course Number**.

[Course]	Select the checkbox next to each course you want to include in the course catalog.

6. Click **Submit**. The Course Catalog page appears.

How to Delete a Course Catalog

Deleting a course catalog deletes the following items related to that catalog: courses, teacher assignments, constraints, and course relationships. You cannot delete the active catalog. To inactivate a catalog so that it can be deleted, see *Build Scenarios*.

Note: This function does not delete courses from the school's Available Courses for [Year] page.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Course Catalogs** from the PowerScheduler menu. The Catalogs page appears.
3. Click the name of the catalog you want to delete. The Edit Course Catalog page appears.
4. Click **Delete**. The Delete Catalog page appears.
5. Select the checkbox if you are sure you want to delete this course catalog.
6. Click **Submit**. The Changes Recorded page appears.

Rooms Overview

Your school's layout and classrooms are essential parts of the scheduling process. Entering all of the necessary room information allows the system to consider the most efficient use of available space when building the master schedule.

When performing the *Schedule Parameters* function, you defined the departments and facilities within your school. Now it is time to enter the rooms. To each room, you can associate specific departments and facilities so that the system schedules courses in the appropriate locations.

Note: Only enter classrooms needed for next year's schedule. For example, if you know you are not going to hold classes in a particular room, do not enter its information in the system. If a room that you will not use next year is in the system, you can leave it there as long as you make it unavailable for scheduling. For more information, see *How to Edit a Room*.

To ensure that there is a place for each section of a course to meet, you must schedule them into classrooms. The system assigns courses to rooms based on the following priorities (listed from highest to lowest priority):

- The assigned teacher's preferred classroom
- Any classroom associated with the same department as the course being scheduled
- Any classroom associated with the same department as the assigned teacher
- Any classroom with an adequate number of seats

Note: If the course requires a special facility, the system considers rooms that provide the necessary facility only. If no facility is available, then the system cannot schedule the course.

Rooms

Define locations for courses so that the system best utilizes available space when building a master schedule. To create several rooms simultaneously, see *How to Auto Create Rooms*.

How to Filter the Rooms Page

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Rooms** from the PowerScheduler menu. The Rooms page appears.
3. If needed, click the **Filter** arrow to expand this section.

   Note: Click the **Filter** arrow again to collapse this section.

4. Use the following table refine your search:

Field	Description
Search	1. Enter search criteria in the field. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.
[Column]	In addition to filtering by the Search field, you can filter by column headings. To filter by column headings:

	1. Click **+**. **Note:** The **+** appears shaded if all filters have been added. To delete a filter, click **-** next the filter. 2. From the first pop-up menu, choose one of the following: • **Department** • **Dept. Use Only** • **Description** • **Facilities** • **Fac. Use Only** • **Always Free** • **Max** • **Number** • **Scheduled** 3. Enter search criteria in the search field. **Note:** Use a comma-separated list for multiple values. 4. To add another filter, repeat Step 1 through Step 3. 5. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

The following information appears:

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, rooms are sorted by Room Number, Department, and then Facility.

- **Number**
- **Description**
- **Department**
- **Matrix**
- **Facilities**
- **Max**
- **Scheduled**
- **Dept. Use Only**
- **Fac. Use Only**
- **Always Free**

How to Add a Room

Create a room for each space within your school that will be used for scheduling. This could include offices and libraries.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Rooms** from the PowerScheduler menu. The Rooms page appears.
3. Click **New**. The Add/Edit Room page appears.
4. Use the following table to enter information in the fields:

Field	Description
Room Number	Enter the room number.
Room Description	Enter a description of this room.
Department	Click **Associate** to select the department for this room. If you associate this room with a specific department, such as **Math**, the system will do its best to schedule math courses in this room. To ensure that this room will only hold Math courses, you must also select the **Department Use Only** checkbox. **Note:** Click Department to create or edit departments at your school.
Building	Click **Associate** to select this room's building. **Note:** Click Building to create or edit buildings at your school.
House	Click **Associate** to select this room's house. **Note:** Click House to create or edit houses at your school.
Use for Scheduling	Select the checkbox if you want the system to consider this classroom when it assigns courses to rooms. Otherwise, deselect the checkbox.

	For example, some rooms (such as the cafeteria) are not used for scheduling. Deselect the checkbox to indicate if the room is not to be scheduled. If this is a room that you want to leave in the system but will not be using for scheduling next year, deselect the checkbox.
Room is Always Free	If you select the checkbox, the system can schedule multiple courses in this room at the same time. This function is often used with gymnasiums. However, sometimes the Room Maximum field can cause problems, and it would make more sense to break the class into Gym 1 and Gym 2 if you know that the maximum number of courses taught in the gym is two. If you deselect the checkbox, only one course can be scheduled in this room per period.
Department Use Only	Select the checkbox if you want the system to schedule in this room only courses that belong to this room's department. If you deselect the checkbox, the system schedules mostly courses with the same department as the room. But it is possible for the system to schedule a course that belongs to another department into this room. This would happen if some departments need more space than others. **Note:** If you select the checkbox, do not select the Facility Use Only checkbox.
Facility Use Only	Select the checkbox to specify that the system can schedule only courses requiring the facilities you enter in the Room Facilities field in this room. **Note:** If not many courses require the facilities in this room and you select the checkbox, the system does not fully schedule the room; the room remains free rather than accommodating another course. If you deselect the checkbox, the system considers the facilities you enter in the Room Facilities field as suggestions. For example, assume the system needs to schedule the computer course Algorithms and Data Structure. Though the course does not

	require a computer lab facility, the system can schedule the course in the room with the computer lab if it is free. **Note:** If you select the checkbox, do not select the Department Use Only checkbox.
Room Facilities	Click **Associate** to select the facilities of this room, if any. Facilities are any special characteristics of a room that courses may require. For example, a room might have a kitchen, computer lab, stage, or wood shop. Most classrooms do not have room facilities. There is a limit of 50 characters that can be entered in this field. **Note:** Click **Facilities** to create or edit facilities at your school.
Room Maximum	Enter a number to determine the maximum number of students that this room can accommodate. The capacity of the room limits the courses that the system can schedule there. For example, if you enter **25**, the system cannot schedule a course section with a maximum of 35 students into this room.

5. Click **Submit**. The Rooms page appears.

   Next, you might want to assign a course to a particular room. For example, maybe your school has several biology labs, and Biology 1 needs to be held in the classroom closest to the teacher's preferred room. To force a course to schedule in a particular room, define a Course Room constraint. For more information, see *Build Constraints*.

How to Edit a Room

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Rooms** from the PowerScheduler menu. The Rooms page appears.
3. To filter the page, see *How to Filter the Rooms Page*.
4. Click the number of the room you want to modify. The Add/Edit Room page appears.
5. Use the following table to edit information in the fields:

Field	Description
Room Number	Enter the room number.
Room Description	Enter a description of this room.
Department	Click **Associate** to select the department for this room. If you associate this room with a specific department, such as **Math**, the system will do its best to schedule math courses in this room. To ensure that this room will only hold Math courses, you must also select the **Department Use Only** checkbox. **Note:** Click Department to create or edit departments at your school.
Building	Click **Associate** to select this room's building. **Note:** Click Building to create or edit buildings at your school.
House	Click **Associate** to select this room's house. **Note:** Click House to create or edit houses at your school.
Use for Scheduling	Select the checkbox if you want the system to consider this classroom when it assigns courses to rooms. Otherwise, deselect the checkbox. For example, some rooms (such as the cafeteria) are not used for scheduling. Deselect the checkbox to indicate if the room is not to be scheduled. If this is a room that you want to leave in the system but will not be using for scheduling next year, deselect the checkbox.
Room is Always Free	If you select the checkbox, the system can schedule multiple courses in this room at the same time. This function is often used with gymnasiums. However, sometimes the Room Maximum field can cause problems, and it would make more sense to break the class into Gym 1 and Gym 2

	if you know that the maximum number of courses taught in the gym is two. If you deselect the checkbox, only one course can be scheduled in this room per period.
Department Use Only	Select the checkbox if you want the system to schedule in this room only courses that belong to this room's department. If you deselect the checkbox, the system schedules mostly courses with the same department as the room. But it is possible for the system to schedule a course that belongs to another department into this room. This would happen if some departments need more space than others. **Note:** If you select the checkbox, do not select the Facility Use Only checkbox.
Facility Use Only	Select the checkbox to specify that the system can schedule only courses requiring the facilities you enter in the Room Facilities field in this room. **Note:** If not many courses require the facilities in this room and you select the checkbox, the system does not fully schedule the room; the room remains free rather than accommodating another course. If you deselect the checkbox, the system considers the facilities you enter in the Room Facilities field as suggestions. For example, assume the system needs to schedule the computer course Algorithms and Data Structure. Though the course does not require a computer lab facility, the system can schedule the course in the room with the computer lab if it is free. **Note:** If you select the checkbox, do not select the Department Use Only checkbox.
Room Facilities	Click **Associate** to select the facilities of this room, if any. Facilities are any special characteristics of a room that courses may require. For example, a room might have a kitchen, computer lab, stage, or wood shop. Most classrooms do not have room facilities.

	There is a limit of 50 characters that can be entered in this field. **Note:** Click **Facilities** to create or edit facilities at your school.
Room Maximum	Enter a number to determine the maximum number of students that this room can accommodate. The capacity of the room limits the courses that the system can schedule there. For example, if you enter **25**, the system cannot schedule a course section with a maximum of 35 students into this room.

6. Click **Submit**. The Rooms page appears.

How to Delete a Room

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Rooms** from the PowerScheduler menu. The Rooms page appears.
3. To filter the page, see *How to Filter the Rooms Page*.
4. Click the number of the room you want to delete. The Add/Edit Room page appears.
5. Click **Delete**. The Rooms page appears.

How to View the Room Matrix

The room matrix function creates a visual, graphical representation of a room's schedule. This schedule can be printed, though not for more than one room at a time.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Rooms** from the PowerScheduler menu. The Rooms page appears.
3. To filter the page, see *How to Filter the Rooms Page*.
4. Click **View** next to the room for which you want to view the room matrix. The room matrix displays a room's schedule for each period and day in each term. Identical colors on the schedule indicate the same section. A blank block means that nothing is scheduled for that block in that term. If all matrix preferences are selected, each block includes the following information:
    - **Name of the course**
    - **Course number**

- **Section number**
- **Name of the teacher for this section**
- **Expression, which is the combination of periods and days**
- **Term**
- **Number of students scheduled for this section**
- **Maximum enrollment for this section**

Student Information

As part of the process of preparing to build your master schedule, you need to confirm that the appropriate students are available in your database for scheduling. Before the system can build the schedule, you must enter detailed scheduling information for each student.

Update the following fields for all students who will attend your school next year:

- *Next School Indicator*
- *Next Year Grade*
- *Priority*
- *Year of Graduation*
- *Schedule This Student*

Update the following fields for students who will not attend your school next year:

- Schedule This Student
- Next School Indicator

In addition to the required settings, there are a number of optional settings you can use to assign students to houses, buildings, and teams.

It is easy to update for a group of students many of the required scheduling preferences fields, such as Next Year Grade and Schedule This Student. In certain circumstances, you may need to change or update a field for an individual student.

Warning: If you use the Update Selections tool to mass update a field value, that change cannot be undone; the new value appears in the field for all of the selected students. To remove the new value, you need to either manually change the value for each student's record or perform another Update Selections function to reverse your change.

Next Year Grade

Set the Next Year Grade field for all of the students who will attend your school next year. You do not need to set this field for students who are graduating from your school.

How to Set the Next Year Grade Field for a Student

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

    The Edit Scheduling Preferences page appears.

6. Enter a grade level number in the **Next Year Grade** field.
7. Click **Submit**. The Changes Recorded page appears.

How to Set the Next Year Grade Field for an Entire Grade Level

Repeat this procedure for each appropriate grade level. Also, while you are working with a particular grade level, you may want to update the scheduling priority (Sched_Priority) and year of graduation (Sched_YearOfGraduation) fields in addition to the next year grade field (Sched_NextYearGrade).

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Update Selections**. The Update Selections page appears.
4. Choose **Grade_Level** from the pop-up menu below Search Students.
5. Choose **=** from the pop-up menu in the second field.
6. Enter in the next field the number that represents the appropriate grade level, such as **9**.
7. Click **Search all records in this school**. The Update Selections page displays the new number of records.
8. Click **Modify Records**. The Modify Records page appears.
9. Choose **Sched_NextYearGrade** from the pop-up menu.
10. Enter in the next field the grade level number you want to assign to these students, such as **10**.
11. Click **Modify Selected Records**. The Update Selections page appears.

Priority

You can assign scheduling priorities to students for the system to follow when loading student schedules. Students can share the same priority.

For example, if there are more requests than available spots, you might want the system to schedule graduating students first because it is their last chance to take the courses they request. If this is the case, assign all twelfth graders a priority of 10, all eleventh graders a priority of 20, all tenth graders a priority of 30, and all ninth graders a priority of 40.

Note: Priority numbers can range from 1 to 999. The lower the number, the higher the priority. Some schools set priorities in increments of 10 to accommodate future modifications. Also, starting with 10 as the default priority number allows for special cases that need the highest priority to be given a number lower than 10.

To assign a priority to an entire grade level, see *How to Set the Next Year Grade Field for an Entire Grade Level*.

How to Assign Priority to a Student

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

   The Edit Scheduling Preferences page appears.

6. Enter a number in the **Priority** field.
7. Click **Submit**. The Changes Recorded page appears.

Year of Graduation

Set the Year of Graduation field for all of the students who will attend your school next year. Setting the year of graduation for any new registers and incoming students from previous grades reduces future scheduling work and provides another way to perform advanced student searches. You do not need to set this field for graduating students.

To set the year of graduation for an entire grade level, see *How to Set the Next Year Grade Field for an Entire Grade Level*.

How to Set the Year of Graduation for a Student

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

    The Edit Scheduling Preferences page appears.

6. Enter a number in the **Year of Graduation** field, such as **2012**.
7. Click **Submit**. The Changes Recorded page appears.

Schedule This Student

Let the system know which of your students you want to include in the scheduling process. If you do not indicate that you want to schedule a student who has made course requests, the system will be unable to schedule that student.

Not only do you have to select the Schedule This Student checkbox to include the appropriate students, but also you must exclude graduating students by deselecting the Schedule This Student checkbox.

Though you can indicate that you want to schedule an individual student, you may prefer to modify this setting for a group of students.

How to Schedule an Individual Student

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.

5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

    The Edit Scheduling Preferences page appears.

6. Select the **Schedule This Student** checkbox.
7. Click **Submit**. The Changes Recorded page appears.

How to Schedule All of Next Year's Students

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Update Selections**. The Update Selections page appears.
4. Choose **Grade_Level** from the pop-up menu in the first field under the Search Students heading.

    Note: if the Search Students heading does not appear, choose **Students** from the Current Table pop-up menu.

5. Choose **<** from the pop-up menu in the second field.
6. Enter in the last field the number that represents the highest grade level at your school, such as **12**.
7. Click **Search all records in this school**. The Update Selections page displays the new number of records.
8. Click **Modify Records**. The Modify Records page appears.
9. Choose **Sched_Scheduled** from the pop-up menu.
10. Enter **True** in the next field to indicate that you want these students to be included in the scheduling process.
11. Click **Modify Selected Records**. The Update Selections page appears.

How to Exclude Graduating Students from Scheduling

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Update Selections**. The Update Selections page appears.
4. Choose **Grade_Level** from the pop-up menu in the first field under the Search Students heading.

Note: if the Search Students heading does not appear, choose **Students** from the Current Table pop-up menu.

5. Choose **=** from the pop-up menu in the second field.
6. Enter in the last field the number that represents the highest grade level at your school, such as **12**.
7. Click **Search all records in this school**. The Update Selections page displays the new number of records.
8. Click **Modify Records**. The Modify Records page appears.
9. Choose **Sched_Scheduled** from the pop-up menu.
10. Enter **False** in the next field to indicate that you do not want these students to be included in the scheduling process.
11. Click **Modify Selected Records**. The Update Selections page appears.

Optional Scheduling Preferences

The following fields on the Edit Scheduling Preferences page are optional: Buildings, Houses, and Teams. It is possible that your school uses none, some, or all of these fields.

How to Assign a Student to a Building

If your school uses buildings, you should have created them using the section *Schedule Parameters*. Now you can assign students to those buildings.

To complete this task, you must know exactly what these buildings are named in the system. Find this information by choosing Buildings under the Parameters heading from the PowerScheduler menu.

To assign a group of students to a building, see *How to Assign a Group of Students to a Building, House, or Team*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

   The Edit Scheduling Preferences page appears.

6. Click **Associate** to select the name of the appropriate building in the Next Year Campus/Building field.
7. Click **Submit**. The Changes Recorded page appears.

How to Assign a Student to a House

If your school uses houses, you should have created them using the section *Schedule Parameters*. Now you can assign students to those houses.

To complete this task, you must know exactly what these houses are named in the system. Find this information by choosing Houses under the Parameters heading from the PowerScheduler menu.

To assign a group of students to a house, see *How to Assign a Group of Students to a Building, House, or Team*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

    The Edit Scheduling Preferences page appears.

6. Click **Associate** to select the name of the appropriate house in the Next Year House field.
7. Click **Submit**. The Changes Recorded page appears.

How to Assign a Student to a Team

If your school uses teams, you should have created them using the section *Schedule Parameters*. Teams are either static or dynamic. If you are using static teams, you must assign each student to a particular team, either individually or in groups.

To complete this task, you must know exactly what these teams are named in the system, but you do not need to know the number of the team. The team number appears next to the Next Year Team field after you complete the following procedure. Find the name of the team by choosing Team under the Parameters heading from the PowerScheduler menu. For more information, see *Teams*.

To assign a group of students to a team, see *How to Assign a Group of Students to a Building, House, or Team*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

   The Edit Scheduling Preferences page appears.

6. Choose the appropriate team in the **Next Year Team** field from the pop-up menu.

   Note: If there is a number to the right of the blank **Next Year Team** pop-up menu, the student was previously associated with a team at a different school. You must clear the **Next Year Team** field using the *Update Selection* function.

7. Click **Submit**. The Changes Recorded page appears.

How to Assign a Group of Students to a Building, House, or Team

Use this procedure to assign a group of students to a building, house, or team.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Update Selections**. The Update Selections page appears.
4. Click **Select Records by Hand**. The Select Records By Hand: Students page appears.
5. Press and hold COMMAND (Mac) or CONTROL (Windows) and click the names of the students you want to assign to a particular building.
6. Click **Submit**. The Update Selections page appears.
7. Click **Modify Records**. The Modify Records page appears.

8. Choose **Sched_NextYearBuilding** from the pop-up menu. If assigning students to a house, choose **Sched_NextYearHouse**. If assigning students to a team, choose **Sched_NextYearTeam**.
9. Enter the name of the building, house, or team into which you want to assign these students in the next field. Enter the name exactly as it appears in the system.
10. Click **Modify Selected Records**. The Update Selections page appears.

Student Schedule Demographics

Use the Demographics page to view student information in the scheduling area. To edit the student's demographic information, see *Demographics*.

How to View Student Schedule Demographics

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Demographics** from the pop-up menu.
    - Click the **Demographics** tab.

   The Demographics page appears.

Graduation Plan Progress

Use the Graduation Plan Progress page in the schedule area to view information about a student's four-year graduation plan, any post-secondary plans, and the progress of each of those plans.

Note: This procedure may also be performed via **Start Page > Student Selection > Graduation Plan Progress**.

How to View a Student's Graduation Plan Progress

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.

3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Planner** from pop-up menu.
    - Click the **Grad Planner** tab.

The Graduation Plan Progress page displays the following information for each plan:

Field	Description
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens. 2. Review information. 3. Click **Close**.
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens. 2. Review information. 3. Click **Close**.
Required Tests	
Test Name	The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc.
Action	If the **Allow Waiver** checkbox on the Edit Graduation Plan Test Requirements page has been enabled, you can waive the required test. To add a waiver to a required test, see *How to Add a Required Test Waiver*. To edit a waiver for a required test, see *How to Edit a Required Test Waiver*.

	To delete a waiver from a required test, see *How to Delete a Required Test Waiver*.
Attempts	The number of times the student has taken the required test.
Completed	Indicates whether the student has passed, failed, waived, or has not taken the required test.
Subjects Groups	
Subject Group	The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information: 1. Click the name of a subject group. The [Subject Group] drawer opens. 2. Review information. 3. Click **Close**.
[Waiver]	If the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled for a subject group, you can waive graduation requirements for students within the subject group. To add a waiver to a subject group, see *How to Add a Subject Group Waiver*. To edit a waiver for a subject group, see *How to Edit a Subject Group Waiver*. To delete a waiver from a subject group, see *How to Delete a Subject Group Waiver*.
Earned	The total number (and individual number) of credits for courses within the subject group that the student has earned.
Enrolled	The total number of courses within the subject group that the student is currently enrolled in.

Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.
Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: • Dark green indicates completed credits. • Green indicates current enrollments. • Blue indicates waived credits. • Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

How to Add a Required Test Waiver

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
   - Choose **Grad Planner** from pop-up menu.
   - Click the **Grad Planner** tab.

   The Graduation Plan Progress page appears.

6. In the Required Tests section, click the **Plus (+)** button next to the required test for which you want to add a waiver. The Add Waiver drawer opens.
7. Use the following table to enter information in the fields:

Field	Description
Test Name	The name of a required test.
Waiver Type	Choose a waiver type from the pop-up menu.
Waiver Reason	Choose a waiver reason from the pop-up menu.
Waiver Source	Choose a waiver source from the pop-up menu.
Waiver Date	Indicate the date the waiver is effective.
Authorized By	Choose the name of the person authorizing the waiver from the pop-up menu.

8. Click **Submit**. The Add Waiver drawer closes.

How to Edit a Required Test Waiver

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Planner** from pop-up menu.
    - Click the **Grad Planner** tab.

   The Graduation Plan Progress page appears.

6. In the Required Tests section, click the **Pencil** icon next to the required test for which you want to edit a waiver. The Edit Waiver drawer opens.
7. Edit as needed. For detailed field descriptions, see *How to Add a Required Test Waiver*.

8. Click **Submit**. The Edit Waiver drawer closes.

How to Delete a Required Test Waiver

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Planner** from pop-up menu.
    - Click the **Grad Planner** tab.

    The Graduation Plan Progress page appears.

6. In the Required Tests section, click the **Pencil** icon next to the required test for which you want to delete a waiver. The Edit Waiver drawer opens.
7. Click **Delete**.
8. Click **Confirm Delete**. The Edit Waiver drawer closes.

How to Add a Subject Group Waiver

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Planner** from pop-up menu.
    - Click the **Grad Planner** tab.

    The Graduation Plan Progress page appears.

6. In the Subject Groups section, click the **Plus (+)** button next to the subject group for which you want to add a waiver. The Add Waiver drawer opens.
7. Use the following table to enter information in the fields:

Field	Description
Graduation Plan	The name of the graduation plan.
Subject Group	The name of the subject group.
Path to Node	The location of the subject group within the subject group list.
Waiver Type	Choose a waiver type from the pop-up menu.
Waiver Reason	Choose a waiver reason from the pop-up menu.
Waiver Source	Choose a waiver source from the pop-up menu.
Elective Subject Group	Choose an elective subject group from the pop-up menu.
Waiver Date	Indicate the date the waiver is effective.
Credit Waived	Indicate the number of credits to waive.
Authorized By	Choose the name of the person authorizing the waiver from the pop-up menu.

8. Click **Submit**. The Add Waiver drawer closes.

How to Edit a Subject Group Waiver

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Planner** from pop-up menu.

- Click the **Grad Planner** tab.

The Graduation Plan Progress page appears.

6. In the Subject Groups section, click the **Pencil** icon next to the subject group for which you want to edit a waiver. The Edit Waiver drawer opens.
7. Edit as needed. For detailed field descriptions, see *How to Add a Waiver*.
8. Click **Submit**. The Edit Waiver drawer closes.

How to Delete a Subject Group Waiver

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Planner** from pop-up menu.
    - Click the **Grad Planner** tab.

The Graduation Plan Progress page appears.

6. In the Subject Groups section, click the **Pencil** icon next to the subject group for which you want to delete a waiver. The Edit Waiver drawer opens.
7. Click **Delete**.
8. Click **Confirm Delete**. The Edit Waiver drawer closes.

Related Topics

- *Graduation Planner*

Schedule Graduation Check

Use the Graduation Progress page in the schedule area to view information about a student's progress toward graduation. View the required classes and class categories, required credit hours, number of credit hours completed and currently in progress, and number of credit hours needed to meet graduation requirements.

How to View Schedule Graduation Check

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Grad Progress** from the pop-up menu.
    - Click the **Grad Progress** tab.

   The Graduation Progress page appears.

6. Select the appropriate graduation requirement set from the pop-up menu. The Graduation Progress page displays the student's progress towards the requirements for that graduation requirement set.

Student Schedule Matrix

The student matrix function creates a visual, graphical representation of a student's schedule. The matrix displays "100% Scheduled" when the schedule is complete. This schedule can be printed, though not for more than one student at a time.

You can also use the matrix to manually enroll students in courses based on their course requests. For more information, see *How to Manually Schedule Students*.

How to View the Student Schedule Matrix

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Matrix** from the pop-up menu.
    - Click the **Matrix** tab.

   The Schedule Matrix page displays the percentage scheduled calculations for the student:

- % Scheduled - Percentage of requests successfully filled
- % Core Scheduled - Percentage of requests for core classes successfully filled
- % Primary Requests Satisfied - Percentage of primary requests (non-alternate requests) that were successfully filled
- % Total Requests Satisfied - Percentage of total requests including alternate requests that were filled

The schedule matrix displays the student's schedule for each period and day in each term. Identical colors on the schedule indicate the same section. A blank block means that nothing is scheduled for that block in that term. If all matrix preferences are selected, each block includes the following information:

- Course name
- Course number
- Section number
- Teacher name
- Room number
- Expression, which is the combination of periods and days
- Year term

How to Set Student Schedule Matrix Preferences

Indicate what type of information you want to display on the student schedule matrix. Though you can navigate to the Student Schedule Matrix Preferences page from an individual student's schedule matrix, the settings you select apply to all student schedule matrices.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Matrix** from the pop-up menu.
    - Click the **Matrix** tab.

    The Schedule Matrix page appears.

6. Click **Matrix Preferences**. The Student Schedule Matrix Preferences page appears.
7. Use the following table to enter information in the fields:

Field	Description
Course Name	Select the checkbox to display the course name.
Course Number.Section Number	Select the checkbox to display the course and section numbers.
Teacher Name	Select the checkbox to display the teacher name.
Room	Select the checkbox to display the room number.
Expression Term	Select the checkbox to display the expression, which is the period and day combination.

8. Click **Submit**. The Schedule Matrix page displays the items selected on the Student Schedule Matrix Preferences page.

Student Course Requests

Student course requests are critical to scheduling, whether you use PowerScheduler or Automated Walk-In (AWI) scheduling. During the PowerScheduler Build process, for example, Student Course Requests are utilized to determine how many sections of a course are required. During the Scheduler Load process or when using AWI scheduling, the Requests are used to place the students into their desired or required courses. Requests can also be used to make PowerScheduler and AWI scheduling load students into selected sections of a course.

When using PowerScheduler to build a master schedule or load students into courses, the goal is to satisfy as many student course requests and to have the most balanced schedule possible. Both PowerScheduler and AWI scheduling utilize student course requests when creating Master Schedules or Student Schedules.

Before creating student course request pages, some preparation is required. This involves setting up the schools on the PowerSchool server for the upcoming scheduling year, setting student scheduling preferences, adding any new courses, collecting the appropriate grade-level requirement information, and creating course groups and student request screens. Once complete, you can then begin building or loading schedules for the next school year.

The student course request process involves several steps. Complete these steps in the following order:

1. Create a scenario for each school before using PowerScheduler to build master schedules or load student schedules for each new scheduling year. It is recommended that you use Auto Schedule Setup to create a scenario for all schools in your district, whether or not the school will use PowerScheduler for scheduling purposes. That way, the appropriate students and their course requests will appear in the correct schools during the scheduling process. For more information, see *Auto Scheduler Setup*.
2. Set the schedule year for the upcoming year at all schools on the PowerSchool server. Approximate start and end dates for the new scheduling year will be required; these can be modified later, if necessary. For more information, see *How to Set the Schedule Year*.
3. Set the Next School, Next Year Grade, and Schedule This Student indicators for all active students using the Student Field Value and Next School group functions or by setting each student individually from the student's Schedule Setup page. These fields, with the exception of Next School, may also be mass-filled for each school using the Auto Fill Student Information function in PowerScheduler. Note that the Next School indicator must be set before using this function for those students who will be scheduled. For more information, see *How to Auto Fill Student Information*.
4. Add new courses to the Available Courses for [Year] page at any schools that will be using them for scheduling, then activate the courses in the course catalogs. For more information, see *Course Catalogs*.
5. Collect appropriate grade-level information. For more information about what information to gather, see *Grade-Level Requirements*.
6. Create course groups. For more information, see *Course Groups*.
7. Create student course request pages. For more information, see *Student Course Request Pages*.
8. Enter student course requests. For more information, see *Student Course Request Entry*.

Grade-Level Requirements

Determine the individual course requirements at your school, such as the names of required courses and number of credits students must take in each grade level. Having all of this information readily available for reference will make it much easier to create the student course request pages.

Collect the following information for each grade level:

- Required courses

- Number of credits that must be taken
- Possible semester elective courses
- Possible year-long elective courses
- Possible no-credit courses
- Number of terms for each request
- Before- or after-school courses
- Possible lunch periods

The following is an example of what you might collect for a ninth-grade request page:

Information to Collect	**Example**
Required courses	• One semester of each of the following: Software Applications 1, Software Applications 2, General Science 1, General Science 2, Health, Word Processing • Two semesters of English: English 9, English 9 Honors, or English 9 Basic Skills • Two semesters of math: Consumer Math, Pre-Algebra, Algebra I, Algebra II, or Geometry
Number of credits that must be taken	Ninth graders must take 7 full credits (14 semester classes)
Possible semester electives	Woods I, Woods II, Beginning Pottery, Art I, Art II, Beginning Foods, Fitness for Life (PE), any other Physical Education class, any computer class
Possible year-long electives	Band, Chorus, Audition Choir, any first-year Foreign Language, Agriculture I, Horticulture I
Possible no-credit courses	Only students with special permission can take no-credit periods: Study Hall, Work Experience, released time for religious or other academic classes, Independent Study
Number of terms for each request	Each request will represent one semester of course material

Before- or after-school courses	No class will be offered to ninth graders before or after school
Possible lunch periods	Lunch is not part of the ninth grade student schedule

Course Groups

To make it easier for students, parents, or staff members to enter requests, you have the option of creating course groups. Course groups represent the courses that are available to a student for a specific request.

For example, when eighth-grade students select a ninth-grade elective course for the next school year, they are presented with a list of valid ninth-grade elective course options. Students must make their selection from the list of courses that you determine are valid for a particular selection.

Note: It is recommended that course groups for scheduling use should only contain courses that require the same number of student course requests. For example, you should not combine single semester courses with year-long courses, as this could lead to an inaccurate count of requests and credit hours.

Create the lists by making a course group for all predetermined requirements. For example, in the case that you need to create six course groups for a particular grade level, you might create three groups for core courses, one for semester electives, one for year-long electives, and one for no credit electives.

Course group	Example
Core courses	Software Application I and II, General Science 1 and 2, Health, Word Processing English 9: English 9, Honors, Basic Skills Mathematics 9: Consumer Math, Pre-Algebra, Algebra I, Algebra II, Geometry
Semester electives	Woods I, Woods II, Beginning Pottery, Art I, Art II, Beginning Foods, Fitness for Life (PE), any other Physical Education class, any computer class

Yearlong electives	Band, Chorus, Audition Choir, any first-year Foreign Language, Agriculture I, Horticulture I
No credit electives	Study Hall, Work Experience, Released Time, Independent Study

How to Create a Course Group

Repeat this process for all course groups required for each grade level or request type at your school.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Course Groups** from the PowerScheduler menu. The Course Groups page appears.
3. Choose in which order you want courses to be listed on student course request pages, either by course name or course number, from the pop-up menu.
4. Click **New** in the courses menu. The Edit Course Group page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for the course group. All course groups and graduation requirement sets must have unique names in all schools. **Note:** If there are multiple schools on your server, you may want to create a system for naming your course groups so that they sort in a certain way. For example, you might call the course group containing Apple Grove High School's ninth-grade core courses **AGHS-9-Core Courses**. If you followed this system, all of your schools would sort together, as would the grade levels within them.
Type	Choose the type of course group from the pop-up menu: • **Both**: Course group is for both scheduling and graduation requirement purposes. Existing groups are set to Both by default.

	• **Scheduling Only**: Course group is used for scheduling purposes only. • **Graduation Set Only**: Course group is used for graduation requirement purposes only.
Applies to	Choose whether you want to apply the course group to all schools or only to the current school. By default, course groups are only applied to the current school.

6. Select the checkbox next to the name of each course that should belong to this group.
7. Click **Submit**. The Course Groups page appears.

How to Delete a Course Group

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Course Groups** from the PowerScheduler menu. The Course Groups page appears.
3. Choose the course group you want to edit from the courses menu. The Edit Course Group page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Course Groups page appears.

Student Course Request Pages

Create course requirements and student course request pages for each grade level in the school. The course request pages contain courses you select for the various course groups from which students can make their selections. The request pages require students to select only courses and electives that have been approved for their grade level. If you need to make an exception, you can do so manually. For more information about grade-specific requirements, see *Requirements*.

Course Request Screens are relevant to whatever is selected as the scheduling year. The scheduling year also determines which Request Screen appears to parents and students. For example, if the current school year is 2011-2012 and the schedule year is set to 2012-2013, students who are in tenth grade during 2011-2012 will use the Grade 11 request screen. For more information, see *How to Set the Schedule Year*.

When creating a year, the corresponding registration records from the previous year are copied to the new year. If registration records already exist for the school and year, then the registration records are not copied.

How to Create a Request Screen in PowerScheduler

Because course requirements vary for each grade level, you can create new or edit existing course request pages for each grade level in your school. The Next School Indicator field points to the school students will attend next year. For example, a school district consists of two high schools and three junior high schools. An eighth grader entering student course requests will view the request page for the high school set as his or her next school. Other eighth graders, whose next school is set to the other high school, would view a different request page.

Note: It is important to set all students' next school indicator, even if they stay at the same school next year. For more information, see *Student Information*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Screen Setup** from the PowerScheduler menu. The Requesting Setup Future page appears.
3. Note the Future Requests menu displays all of the grade levels at your school.
4. Click the appropriate grade level. The [grade level] Request Screen Setup for [school year] appears.

   Note: The grade level selected refers to the students' next year grade level.

5. Use the following table to enter information in the fields:

Field	Description
Enable student registration screen for this grade in	Indicate which portals you want the student registration screen for this grade to appear by choosing the appropriate checkboxes: • **PowerSchool Admin Portal** • **PowerSchool Student and Parent Portal** Click **Preview Student Registration Screen** to preview the registration screen.

Message to display on registration screens for students in this grade:	Enter any text you want to display on registration screens for students in this grade.
Number of credit hours each student must submit (excluding alternate requests)	Enter a minimum and maximum number of credits needed to complete the registration process. For example, you could enter **5** for Minimum and **7** for Maximum, thus ensuring that no student takes courses whose total credit hours are less than five or more than seven. **Note:** Leaving the Minimum and Maximum fields blank makes it possible for students to request too many or too few credit hours.
New Single Course Requirement	To enter a single class requirement, click to access the Grade-Specific Requirement For Course Requests page. For more information, see *Requirements*.
New Multi-Course Requirement	To enter a multi-class requirement, click to access the Grade-Specific Requirement For Course Requests page. For more information, see *Requirements*.
New Core Requirement	To enter a core requirement, click to access the Grade-Specific Requirement For Course Requests page. For more information, see *Requirements*.
Sort Order	Indicate the order in which you want requirements to display on the registration screens.
Requirement Name	The name of the requirement. Click to access the requirements page. For more information, see *Requirements*.
Type	Indicates the type of requirement: Core Required, Multi-Course, or Single Course. For more information, see *Requirements*.
Course Group	Indicates the course group. For more information, see *Requirements*.

6. Click **Submit**. The [grade level] Request Screen Setup Future page appears.

Requirements

You must create requirement entries for each student course request. Requirement entries make up the body of the request page, informing students which courses they must take and giving them selections from valid course groups. For more information about student course request pages, see *Student Course Request Pages*.

There are three types of requirement entries:

- Single Course Requirement: Students make single selections from a course group. For example, if all eleventh graders need to take one computer course next year, create a Computer course group that includes all of the computer courses. Students select one of the courses from the list to fulfill their Computer requirement.
- Multi-Course Requirement: Students make multiple selections from a course group. For example, if all eleventh graders need to take two business courses next year, create a Business course group that includes all business courses. Students select two or more of the courses from the list to fulfill their Business requirement.
- Core Requirement: Students view a set of requests that are predefined, such as a core set of courses for all ninth graders. There are no options from which students can make selections.

How to Enter a Single Course Requirement in PowerScheduler

A single course requirement appears on the request page as a pop-up menu. Students choose a single course from the list (course group) you create.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Screen Setup** from the PowerScheduler menu. The Future Requests menu displays the available grade levels.
3. Click the grade level for which you want to enter a single course requirement.
4. On the [grade level] Request Screen Setup Future page, click **New Single Course Requirement**. The Grade-Specific Requirement for Course Requests: [grade level] (Future) page appears.
5. Use the following table to enter information in the fields:

Field	Description

Name of this requirement	Enter a name for the requirement, such as **Ninth Grade Math**.
Description/Instructions	Enter a description or instructions for students to read on the screen so they understand exactly what they need to do to meet this requirement. For example: **You are required to enroll in one Math course. Use the pop-up menu to make your selection from the list of available courses.**
List of courses to present to the student in the pop-up menu	Use the pop-up menu to choose the course group you want students to make their selection from, such as **Math 9**.
Must students select a course from the pop-up, or may they leave it blank?	Choose either **Must select one** or **Can leave blank** from the pop-up menu.
Message to display if students are required to select a course, but they leave it blank instead	If you chose **Must select one** in the previous field, you can enter an alert message students will receive if they do not select one of the courses in the group. For example, enter: **You forgot to select one Math course**. If you do not enter a specific message for this requirement, the system displays a generic message: **You did not select a course for this requirement: [requirement name]**.
Request type	Use the pop-up menu to choose the type of request: • **Elective**: Not a requirement • **Alternate**: Used if an elective request is not met. If you select **Alternate**, the system uses this request if it cannot schedule the student in a requested elective. • **Required**: Required course for this grade level **Note:** An alternate request will never replace a required request.

Number of requests to generate	Use the pop-up menu to choose the number of requests that should be generated when this requirement is selected. For example, if Math is a year-long course but sections operate on semesters, choose **2** for two requests. Semester electives may only need one request.
Item sort order	Enter a number between **0** and **100** that indicates the order in which you want this requirement to appear on the request page you are creating.

6. Click **Submit**. The [grade level] Request Screen Setup Future page appears.

How to Enter a Multi-Course Requirement

A Multi-Course requirement appears on the request page as a pop-up menu. Students choose multiple courses from the list (course group) you create.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Screen Setup** from the PowerScheduler menu. The Future Requests menu displays the available grade levels.
3. Click the grade level for which you want to enter a single course requirement.
4. On the [grade level] Request Screen Setup Future page, click **New Multi-Course Requirement**. The Grade-Specific Requirement for Course Requests: [grade level] (Future) page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name of this requirement	Enter a name for the requirement, such as **Ninth Grade Math**.
Description/Instructions	Enter a description or instructions for students to read on the screen so they understand exactly what they need to do to meet this requirement. For example: **You are required to enroll in two Math courses. Use the pop-up menu to make your selection from the list of available courses.**

List of valid courses for this item	Use the pop-up menu to choose the course group you want students to make their selection from, such as **Math 9**.
Number of courses student must select to meet this requirement	Enter the minimum and maximum number of courses students must select for this requirement. For example, enter **2** and **2** to require that no more and no less than two courses from the list are selected.
Message to display if the number of courses selected is not correct	Enter the message you want to appear to students if they do not select the correct number of requirements. If this field is left blank, a generic message will display.
Request type	Use the pop-up menu to choose the type of request: • **Elective**: Not a requirement • **Alternate**: Used if an elective request is not met. If you select Alternate, the system uses this request if it cannot schedule the student in a requested elective. • **Required**: Required course for this grade level. **Note:** An **Alternate** request will never replace a required request
Number of requests to generate	Use the pop-up menu to choose the number of requests that should be generated when this requirement is selected. For example, if Math is a year-long course but sections operate on semesters, choose **2** for requests. Semester electives may only need one request.
Item sort order	Enter a number between **0** and **100** that indicates the order in which you want this requirement to appear on the request page you are creating.

6. Click **Submit**. The [grade level] Request Screen Setup Future page appears.

How to Enter a Core Requirement

A core requirement is a set of courses that members of an entire grade level must request. There is no selection for students to make; you make the selection now so that students view an unalterable list of these required courses on their request pages.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Screen Setup** from the PowerScheduler menu. The grades menu displays the available grade levels.
3. Click the grade level for which you want to enter a single course requirement.
4. On the [grade level] Request Screen Setup Future page, click **New Core Requirement**. The Grade-Specific Requirement for Course Requests: [grade level] Future page appears.
5. Use the following table to enter information in the fields:

Field	Description
Requirement Name	Enter a name for the requirement. For example, assume you are creating a requirement for ninth graders that consists of the core courses in which they must enroll. You could name the requirement **Ninth Grade Core Required Courses**.
Description/Instructions	Enter a description or instructions. Since students will automatically receive the course requests you specify on this page, you could enter **All freshmen must take the following courses:**.
List of valid courses for this item	Use the pop-up menu to choose a course group, such as **Ninth Core Courses**.
Number of requests to generate per course	Use the pop-up menu to choose the number of requests that need to be generated for this requirement. For example, if these are semester-long courses, you would need to generate one request per course. In that case, choose **1** from the pop-up menu.

Item sort order	Enter a number between **0** and **100** that indicates the order in which you want this requirement to appear on the request page you are creating.

6. Click **Submit**. The [grade level] Request Screen Setup Future page appears.

How to Preview the Registration Request Page

After you enter all of the requirements you want to include on the request page, you have an opportunity to review how it looks and verify its accuracy.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Screen Setup** from the PowerScheduler menu. The grades menu displays the available grade levels.
3. Click the grade level for which you created a request page. The [grade level] Request Screen Setup Future page appears.
4. Enter any message you want to appear on the request page in the "Message to display on registration screens for students in this grade" field.

   Note: The checkbox "This grade may register for courses" should not be selected until the request pages are completely set up and you are ready for PowerScheduler to accept course requests.

5. Click **Submit**.
6. At the top of the [grade level] Request Screen Setup page, click **Preview Student Registration Screen** to review the actual output of the page. The Request Form Future page appears.
7. Click **Close** to return to the [grade level] Request Screen Setup Future page if you need to make corrections to any of the individual requirements.
8. Click **Submit**. The [grade level] Request Screen Setup page appears.

Student Course Request Entry

Once you complete and activate student course request pages for each grade level in your school, students and parents or guardians can use the PowerSchool Student and Parent portal to enter requests. You can also enter students' course requests in PowerScheduler.

To enter student course requests one at a time, see either *How to Enter Requests in the Scheduling Area* or *How to Enter Student Requests by Course*, depending on whether you are working with a student or a course. To enter requests for more than one student at a time, see *How to Mass Assign Student Course Requests*.

Course requests entered in PowerScheduler appear on the requesting student's Requests Modify Future and Requests View Future pages in PowerSchool. In addition, administrative staff members can use PowerSchool to enter or delete requests for one or more students. To edit requests, see *How to Edit Student Course Requests*.

After the initial requests are made in PowerSchool or in PowerScheduler, future course requests can be modified or deleted in PowerScheduler.

You may also want to manually schedule a student once his or her course requests are made. For more information, see *How to Manually Schedule Students*.

For alternate course requests, PowerScheduler prioritizes scheduling alternates in the following order: associated Alternate course for a request, individual course requests with the Alternate checkbox selected, and global course substitutions made on the Course Information page. Any request with an Alternate Group Code of "E" (the only acceptable group code) can be replaced with any requests selected as "Alternate" according to PowerScheduler's priority for scheduling alternates.

How to Activate the Student Request Forms

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Requesting, choose **Screen Setup** from the PowerScheduler menu. The grades menu displays the available grade levels.
3. Click the name of a grade level at your school. The [grade level] Request Screen Setup page appears.

   Note: The selected grade level is the grade level for the future year. For example, to activate the course request page for students who will be in 10th grade next year, select **Grade 10**.

4. Select the **This grade may register for classes** checkbox.
5. Click **Submit**. The [grade level] Request Screen Setup page appears.

How to Enter Requests in the Scheduling Area

In addition to the Requests Modify Future page in PowerSchool, you can use PowerScheduler to enter student course requests for a future school year. That school year is determined by the setting on the Set Schedule Year page. For more information about setting the schedule year, see *How to Set the Schedule Year*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Requests** from the pop-up menu.
    - Click the **Requests** tab.

    The Requests page displays the percentage scheduled calculations for the student:

    - % Scheduled - Percentage of requests successfully filled
      Calculated by rounding ((enrolledSlots * 100) / timeSlots)
    - % Core Scheduled - Percentage of requests for core classes successfully filled
      Calculated by rounding ((coreSlots * 100) / coreTimeSlots)
    - % Primary Requests Satisfied - Percentage of primary requests (non-alternate requests) that were successfully filled
      Calculated by rounding ((primeReqSatisfied * 100) / totalRequests)
    - % Total Requests Satisfied - Percentage of total requests including alternate requests that were filled
      Calculated by rounding ((totalReqSatisfied * 100) / totalRequests)

    Note:

    TimeSlots calculated by
    number_of_terms * number_of_days * number_of_periods
    -- find timeSlots by buildId
    select sterms * dpcycle * ppday as timeSlots
    from scheduleBuilds
    where buildId = <scheduleBuilds.buildId>;

    CoreTimeSlots calculated by
    number_of_terms * number_of_days * number_of_core_periods
    -- find coreTimeslots by buildId
    select sterms * dpcycle * (select count(*) from schedulePeriods where buildId = <scheduleBuilds.buildId> and corePeriod = 1) as coreTimeSlots
    from scheduleBuilds
    where buildId = <scheduleBuilds.buildId>;

    TotalRequests calculated by
    -- find totalRequests by studentId and yearId, excluding any global alternate course

```
select count(*) totalRequests
from scheduleRequests
where studentId = <students.id>
and yearid = <4-digit-yearid>
and globalAlternateCourse = 0;
```

Percentage calculated by

```
-- get student requests statistics by studentId and buildId
select totalRequests, enrolledSlots, coreSlots, primeReqSatisfied, totalReqSatisfied
from studentSchedulingResults
where buildId = <scheduleBuilds.buildId>
and studentId = <students.id>;
```

Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

6. Click **New Request**. The Edit Course Request [student name] page appears.
7. Click **Associate**. The Courses pop-up appears.
8. Select the name of the course. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections.
9. Click **Submit**. The Courses pop-up closes.
10. Click **Submit**. The Requests page appears.
11. Use the following table to enter information in the fields:

Field	Description
Number	The number of the requested course appears.
Course Name	The name of the requested course appears.
Note	Additional information about the request.
Alt	Select the checkbox to indicate whether this is an alternate course request.
Code	If this course request cannot be met but can be replaced with any course request selected as "Alternate," enter **E** in this field.

Priority	If you selected the **Alt** checkbox, enter a priority number so the system will know which alternate to load first when a student does not receive the elective he or she wants.
Section Type	Choose the course's section type, if applicable, from the pop-up menu. For example, a student may request a bilingual section of a course.
Alternate 1	Click **Associate** to select the name of the first alternate for this course.

12. Click **Submit**. The Requests page appears.

How to Enter Student Requests by Course

If you are working with a course and want to enter student requests for that course, use the Requests function for the course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
    - Choose **Requests** from the pop-up menu.
    - Click the **Requests** tab.

    The [Course Name] Requests page appears.

    Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

5. Click **New**. The Edit Course Request: [Course Name] page appears.
6. Use the following table to enter information in the fields:

Field	Description

Student	Click **Associate** to select the student for which you are making this request.
Section Type	Choose the course's section type, if applicable, from the pop-up menu. For example, a student may request a bilingual section of a course.
Alternate	Select the checkbox to indicate whether this is an alternate course request.
Alternate Group Code	If this course request cannot be met but can be replaced with any course request selected as "Alternate," enter **E** in this field.
Alternate Priority	This field is reserved for future functionality.
Alternate Course 1	Click **Associate** to select the name of an alternate course for this request.
Alternate Course 2	Click **Associate** to select the name of an alternate course for this request.

7. Click **Submit**. The [Course Name] Requests page appears.

How to Manually Schedule Students

Use the student's Request page to quickly and efficiently schedule a student.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Requests** from the pop-up menu.
    - Click the **Requests** tab.

The Requests page appears.

Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

6. Click **Manually Schedule Student**. The Manually Schedule Student page appears.
7. Select the checkbox next to the course, term, and expression in which you want to enroll the student. Deselect the checkbox next to the course, term, and expression from which you want to drop the student.

   Note: The student's currently scheduled classes appear in gray, available classes appear in green, and full classes appear in red. If an expression is gray and has a selected checkbox, the student is in the class. An asterisk (*) notation means that the class is full, regardless of color. If enrolling the student in a full class, enter the password to override the maximum enrollment in the field at the bottom of the page.

8. Click **Submit**. The Manually Schedule Student page appears.

   Note: To refresh the page to display the last saved selections, click **Reset**.

9. Click **Continue**. The student's Schedule page appears.

How to Edit Student Course Requests

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
   - Choose **Requests** from the pop-up menu.
   - Click the **Requests** tab.

   The Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

6. Use the following table to edit information in the fields:

Field	Description
Number	The number of the requested course appears.
Course Name	The name of the requested course appears.
Note	Additional information about the request.
Alt	Select the checkbox to indicate whether this is an alternate course request.
Code	If this course request cannot be met but can be replaced with any course request selected as "Alternate," enter **E** in this field.
Priority	If you selected the **Alt** checkbox, enter a priority number so the system will know which alternate to load first when a student does not receive the elective he or she wants.
Section Type	Choose the course's section type, if applicable, from the pop-up menu. For example, a student may request a bilingual section of a course.
Alternate 1	Click **Associate** to select the name of the first alternate for this course.

7. Click **Submit**. The Requests page appears.

How to Delete Student Course Requests

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:

- Choose **Requests** from the pop-up menu.
- Click the **Requests** tab.

The Requests page appears.

Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

6. Use the following table to edit information in the fields:

Field	Description
[Delete All]	Select the checkbox in the header row to delete all course requests.
[Delete]	Select the checkbox in the row of each course request you want to delete.

7. Click **Delete Selected**. The Requests page appears.

How to Reference the Course Catalog

Using the Course Catalog pop-up, you can reference the course catalog for the selected scheduling year.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. Click the name of the student you want to work with from the students menu.
5. Do one of the following:
    - Choose **Requests** from the pop-up menu.
    - Click the **Requests** tab.

    The Requests page appears.

6. Click **Course Catalog**. The Course Catalog pop-up appears.
7. Enter search criteria in the **Search** field.

8. To filter by columns:

7.
   a. Click **+**.
   b. From the first pop-up menu, choose one of the following:
      - **Course Name**
      - **Course Number**
      - **Description**
   c. Enter search criteria in the search field.

      Note: Use a comma-separated list for multiple values.

   d. Click **Apply**. The page refreshes and display filtered results.
8. To add another filter, click **+** and repeat steps a through d.

   Note: The **+** appears shaded if all filters have been added.

9. To delete a filter, click **-** next the filter.
10. Click **Apply**. The page refreshes and display filtered results.

    Note: To remove all filter selections, click **Clear**.

11. Use the following table to view search results:

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	Description
Course Name	The course name appears.
Course Number	The course number appears.
Description	The course description appears.
[Pagination]	Use to navigate the search results.

Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

13. Click **Close** when done.

How to Mass Assign Student Course Requests

It is possible that an entire grade level or group of students will need to request the same course or courses. If this is the case, you have the option of mass assigning course requests to these students.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. On the Selected Students page, click **Functions**. The Scheduling Functions page appears.
5. Click **Mass Add Requests**. The Mass Add Requests page appears.
6. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the number of the course you want to assign to the group of students you selected.
Section Type	If applicable, choose the course's section type from the pop-up menu. For example, these students may request a bilingual section of a course.
Request Type	Choose the type of request from the pop-up menu: • **Required** • **Elective** • **Alternate**

Priority	If you selected Alternate in the Request Type field, enter a priority for the request. The lower the number, the higher the priority and the more likely these students will be scheduled into this alternate class.

7. Click **Submit**. The Changes Recorded page appears.

How to Mass Delete Student Course Requests

After student course requests have been entered, you may find that due to a data entry error, an entire group of students was assigned to the wrong course. Alternatively, perhaps there is not enough money in the budget to hold a particular course next year. In these and other similar situations, you have the option of mass deleting student course requests.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Students** from the PowerScheduler menu. The Scheduling page appears.
3. Select students for scheduling. For detailed information, see *Schedule Search and Select*.
4. On the Selected Students page, click **Functions**. The Scheduling Functions page appears.
5. Click **Mass Delete Requests**. The Mass Delete Requests page appears.
6. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the number of the course you want to delete from the group of students you selected.
Section Type	If appropriate, choose the Section Type from the pop-up menu. This ensures that only requests of the selected course that have this section type will be deleted.
Alternate	Select the checkbox to delete only requests for this course that are selected as Alternate.

What to Delete	Choose whether you want to apply the changes to the first occurrence or all occurrences of students' course requests. Deleting only the first occurrence of a request is useful for removing duplicate student course requests.

7. Click **Submit**. The Changes Recorded page appears.

Course Information

Define scheduling preferences for each course in your course catalog. These preferences control how PowerSchool builds your master schedule. See *Course Scheduling Setup*.

The process the system uses to schedule students in courses is similar to the process of constructing a wall of bricks. The master schedule is the wheelbarrow of available bricks. Each brick used to build the walls are the course sections in your course catalog. A good master schedule will have enough bricks with appropriate shapes and sizes to build solid walls for every student.

Building walls without gaps requires that the bricks all fit together. If your bricks come in different shapes, this can be a challenge. For example, a course that meets every day and all year long will have a very different shape from another course that meets every other day for one semester. Building a wall with all types of bricks requires that the wheelbarrow (master schedule) contain the right variety of bricks (course sections) from which to choose.

Course Scheduling Setup

For each course, define its shape or build type. You must also define sections, room requirements, load options, and substitute information. For information about relating courses, see *How to Define Related Courses*.

How to Define Scheduling Preferences

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

The Course Information page appears.

5. Use the following table to enter information in the fields:

Field	**Description**
Course Number	The number that will be used to identify this course appears.
Course Name	The name of the course appears.
Course Description	Enter a detailed course description that will appear on the student course request pages and in the printed version of the course catalog.
Course Credit Hours	Displays the number of credits a that is set in the district course record. This is the value that is used in the live side of PowerSchool to determine what students receive for taking this course.
Request Screen Credits Hours	Enter the number of credits to be displayed on the course requests screens in PowerScheduler. For more information about course requests screens, see *Student Course Request Pages*. **Note:** This value does not copy to the district course record on the live side of PowerSchool. This is meant primarily to accommodate scheduling processes that use adjusted values. For example, if .5 is entered as the credit class value, 1 is used as the credit on the request screens because the schedule is being built as a yearlong class, but before the commit process the split year-long classes function will be used.
Credit Type	The type of credit a student receives for passing this course appears, such as **MATH**, **ENG**, or **FINE**.
Alternate Course Number	The alternate course number appears, if your school uses this field for state reporting or district purposes.
Grade Scale	The grade scale associated with this course appears.

CIP Code	In some states, schools use CIP codes to identify courses as part of a state-managed vocational program.
Vocational Class	Indicates if this is a vocational course.
Schedule This Course	Select the checkbox to schedule this course in the master schedule. If you deselect the checkbox, the system does not include the course in the master schedule.
Use The Course For Lunch	Select the checkbox to indicate that this course will be used exclusively for scheduled lunches. Otherwise, deselect the checkbox. **Note:** For more information, see *Scheduled Lunch*.
Exclude on Report Cards/Transcripts	Select the checkbox if you do not want this course to appear on report cards and transcripts. For example, you may not want courses designated for lunch to appear on students' reports.
Department	Click **Associate** to select the department to which this course belongs. Click **Department** to create a new department or edit an existing one.
Build Type	Build types define the shape of a course. Choose one of the following options from the pop-up menu: • **Standard**: This course meets for the same number of periods every time it meets. For example, a course that meets every day for one period is standard. A course that meets for one period every other day is also standard. • **Lab**: This is a standard course that meets for the same number of consecutive extra periods on certain days in the cycle. For example, a standard Chemistry course meets every day in a six-day cycle (Days A-F). Two days in the cycle, the class meets for two consecutive periods to complete an involved laboratory assignment. • **LabFloat**: This is a standard course that meets extra periods some days in the cycle, but the extra period is not consecutive to the course. For example, a Humanities

	course meets every day in a six-day cycle. One day during the cycle, the students attend a two-period lab in which they complete a community service assignment. The community service assignment does not have to occur directly before or after the Humanities course.
Maximum Enrollment	Enter the maximum number of students you want to schedule in sections of this course.
Target Number of Sections to Offer	Enter the number of sections to offer for this course. **Note:** To calculate this number automatically, you can use one of the following functions: the Calculate Target Number of Sections to Offer function, the Auto Fill Course Information function or the Auto Generate Course Information function.
Number of Teacher Assignments	Enter the number of teacher assignments for this course. For example, if the school decides to offer four sections of Algebra, the engine requires that four teacher assignments are defined. As a result, Teacher A will have an assignment for one section, Teacher B will have an assignment for two sections, and Teacher C will have an assignment for one sections, totaling four teacher assignments. This tells the Scheduling Engine that four sections of Algebra must be built, and also tells the Engine who must teach those sections. **Note:** Only Build and Load scenarios allow for teacher assignments. Teacher assignments are not used by Load Only scenarios.
Periods Per Cycle	The number of periods this course meets in the cycle appears. This number could be greater than or less than the number of days in the cycle. For example, a course could have a value of 4 in the Periods Per Cycle field for a school with a two-days-per-cycle schedule. This course meets for two periods during each day in the cycle. Another way to express periods per cycle is: Periods per meeting * Frequency + Lab Periods per meeting * Lab frequency = Periods per cycle.

Periods Per Meeting	Enter the number of periods this course section meets each time it convenes. Most courses meet for a single period. Some courses have an intensive curriculum and may convene for two or more periods per meeting.
Frequency	The number of days this course meets during a cycle appears. For example, Senior Gym is held A day and B day. Therefore, the frequency is 2. It is important to understand that the frequency of a course is not related to the number of periods it meets within a given cycle.
Terms per Year	The number of terms per year this course meets appears. This value is automatically calculated. For example, Introduction to Art has a Terms Per Year value of 1. This means that a section of this course only meets for a single term. However, Freshman English has a Terms Per Year value of 4, which means this course meets all four terms in the year. Terms Per Year is related to the number of terms you set in the build scenario. Remember that the Terms Per Year value equals the lowest common denominator (LCD) of all scheduling terms. For example, if a school has trimesters, semesters and quarters, the LCD is 12. For a semester course, the Terms Per Year value would be 6, or half of the schedule terms; a trimester course would have a Terms Per Year value of 4, and a quarterly course would have a Terms Per Year value of 3.
Allow Student Repeats in the Same Term	Select the checkbox to allow the system to schedule a student in more than one section of this course in the same term. For example, occasionally students need to double-up on a course within the same term. This is usually done for elective courses, such as Work Release.
Allow Student Repeats in Different Terms	Select the checkbox to allow the system to schedule a student in more than one section of this course in different terms. Use this option for either academic or elective courses.
Balance Terms	For courses with more than one section, select the checkbox if you want the system to attempt to place an equal number of

	sections in each valid term. For example, a course consisting of 13 sections is only offered during Term 1 and Term 3 in a four-term year. Therefore, the system schedules seven sections in one term and six sections in the other.
Valid Start Periods	Select the checkbox next to the appropriate periods to determine in which periods the course is valid to start. For example, if you want a course that has two periods per meeting to start any period except 6 or 7 in a seven-period day, select the checkboxes next to Period 1, Period 2, Period 3, Period 4, and Period 5.
Valid Terms	Click **Associate** to select the terms this course can meet. For example, assume you want the system to schedule a half-year course in the fall of a four-term school year. Select **S1** (first semester) as the only valid term for this course.
Valid Day Combinations	Enter the valid days that this course can meet. For example, if a teacher is available to teach a course only on the B day of an AB schedule, enter **B**. Click **Day** to add or edit a day. Enclose multiple entries in parentheses and separate multiple entries with commas, such as (A,B). Use dashes to indicate day combinations, such as (A-C).
Is This Course A Lab	Select the checkbox if this course is a lab.
Lab Frequency	Enter the number of days this lab meets during a cycle.
Lab Periods Per Meeting	Enter the number of periods this lab meets each time it meets.
Valid Lab Day Combinations	Click **Associate** to select the valid days that this lab can meet. Click **Day** to add or edit a day. Enclose multiple entries in parentheses and separate multiple entries with commas, such as **(A,B)**.
Facilities	Click **Associate** to select the special facilities this course requires, if any. For example, a facility could be a piano, biology lab, or wood shop. If you define a facility here, the system schedules this

	course in a room that contains that facility. Click **Facilities** to add or edit a facility.
Load Priority	Enter a numerical value of **1** to **99** (1 being the highest priority) to prioritize in which course the system should schedule a student when a conflict between two of the student's requests arises. You can enter the same load priority number for several courses. For example, enter a load priority of **10** for all academic courses to ensure that students are loaded into these courses first, **20** for academic electives, and **30** for non-academic electives. **Note:** If this course has a Section Link constraint associated with it, you may want to give it the highest load priority to prevent the section link from being broken.
Load Type	Use the pop-up menu to choose whether this is an **Academic**, **Elective**, or **Alternate** course. The system uses this classification to balance the types of courses in which the student is scheduled during a schedule term. For example, if your school's scheduling terms are semesters, the system does not schedule the student in all elective courses the first semester and all academic courses the second semester.
Balance Priority	Use this pop-up menu to set a secondary priority for the course when loading student schedules. The primary priority is determined by the load priority field. The following settings create an additional priority. For example, if you choose **Grade** from the pop-up menu, the system not only attempts to keep an equal number of students in each section, but also an equal number from all grade levels. The default setting for loading students into the master schedule is Section. Use the pop-up menu to choose one of the following options to ensure a balance of students in each section (optional): • **Section**: When loading students into sections, the system always attempts to keep an even number of students among sections. • **Gender**: Balanced number of males and females in each section.

	• **Grade**: Balanced number of students from each grade level within each section. • **EthnicCode**: Balanced number of students with different ethnic codes within each section. • **House**: Balanced number of members from each house within each section.
Use Pre-Established Teams	Select the checkbox if you want the system to reference teams when scheduling students into this course.
Close Section After Max	Select the checkbox if you want the system to stop scheduling students in a section of this course after the enrollment reaches the number you defined in the Maximum Enrollment field.
Use Section Types	Select the checkbox if you want the system to schedule courses according to section types. For more information about section types, see *Section Types*.
Don't Allow Student Substitutions	Select the checkbox if you do not want the system to attempt to schedule a student in alternate courses if this course is full.
Global Substitution 1	Click **Associate** to select the first course substitution you want the system to schedule for every student who cannot be scheduled in this course.
Global Substitution 2	Click **Associate** to select the second course substitution you want the system to schedule for every student who cannot be scheduled in this course. The system will use this substitution if Global Substitution 1 is no longer available.
Global Substitution 3	Click **Associate** to select the third course substitution you want the system to schedule for every student who cannot be scheduled in this course. The system will use this substitution if Global Substitution 2 is no longer available.

6. Click **Submit**. The Changes Recorded page appears.

How to Define Related Courses

For each course, you can define related courses. The system uses these course relationships when building the schedule. Relate courses to alert the system that it must consider other courses when determining the best place for a course in the master schedule.

For example, if a teacher can instruct multiple special education courses at one time in the same room, you can relate the courses so that the system knows it is possible to do so.

If you define a relationship for a course with another course, you do not have to define the relationship for both courses. But, you can define the relationship for both courses so that it is easy to identify this relationship regardless of which course you are viewing.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
    - Choose **Relationships** from the pop-up menu.
    - Click the **Relationships** tab.

    The Course Relationships page appears.

5. Click **New**. The Edit Course Relationship page appears.
6. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the number of the course for which you want to define a relationship.
Relationship Type	Use the pop-up menu to choose one of the following options: • **Is Blocked for Building With**: This relationship type is used for building a master schedule. Courses that must be related to one another in the schedule. For example, you may want pottery to be scheduled before or after ceramics so that they can share a hot kiln. Alternatively, a medieval literature class may follow a medieval history class.

	• **May Be Built Concurrent With**: This relationship type is used for building a master schedule. Courses that can meet at the same time, in the same place, and be taught by the same teacher. For example, a special education teacher might have a class of ten students, three of whom are taking remedial reading and the remainder of whom study remedial vocabulary and spelling. **Note:** When two courses are blocked simultaneously and share the same teachers, there is no need to add a concurrent relationship between the two courses. Also, the PowerScheduler engine propagates concurrent relationships amongst courses that share a concurrent relationship. For example, if Course A has a concurrent relationship with Course B and Course B has a concurrent relationship with Course C, there is no need to add a concurrent relationship between Course A and Course C. • **Has a Load Coreq of**: Two courses that are scheduled during the same term of a student's schedule. The term of one section must be the same as or a subsection of the term of the other section. For example, if one of the courses is scheduled in Semester 1, then the other may be Semester 1, Trimester 1, or Quarter 1 or Quarter 2. Though a Trimester 2 course overlaps a Semester 1 course, the courses cannot have a "coreq" relationship type. • **Has a Load Postreq of**: A course that must be in a student's schedule in a term after the related course. The course you associate using the Course Number field will be scheduled after the currently selected course. The term of the first section must end before the term of the second section begins. For example, Course B is a post-requisite of Course A. When the system schedules a student for these courses, it ensures that Course B is scheduled into a term after the student is scheduled for Course A. • **Has a Load Prereq of**: A course that must be in a student's schedule in a term before the related course. The course you associate using the Course Number field must be scheduled before the currently selected course. The term of the first section must start after the term of the second section ends. For example, Course A is a prerequisite of

	Course B. When the system schedules a student for these courses, it ensures that Course A is scheduled into a term before the student is scheduled for Course B. • **Must Not Load Coreq With**: The courses cannot be scheduled in the same term or sub-term. For example, if Course A is scheduled for Semester 1, then Course B may be scheduled for Trimester 2 or Trimester 3 but not Trimester 1. This relationship is bi-directional; that is, if you indicate that Course A "Must Not Load Coreq With" Course B, then Course B is automatically set to "Not Load Coreq With" Course A. • **Must Load Distinct (no term overlap) With**: The courses cannot load into overlapping terms. For example, if Course A is scheduled for Semester 1, then Course B may be scheduled for Trimester 3 but not Trimester 1 or Trimester 2. This is also a bi-directional relationship type. • **Must Load the Term After**: The course must load in the next term. For example, if Course A is scheduled for Quarter 1, then Course B may be scheduled in Quarter 2 but not Quarters 1, 3, or 4. Likewise, if Course A is scheduled for Semester 1, then Course B may be scheduled in Quarter 3 or Semester 2. To indicate the reverse of this relationship type, see the "Must Load the Term Before" option. • **Must Load the Term Before**: The course must load in the previous term. For example, if Course A is scheduled for Quarter 3, then Course B may be scheduled in Quarter 2 but not Quarters 1, 3, or 4. To indicate the reverse of this relationship type, see the "Must Load the Term After" option. **Note:** Coreq, Postreq, and Prereq only relate to the current scheduling year. The system does not check historical data for previous courses.
Relationship Code	If you selected a relationship type of **Block**, you must define a relationship code. Use the pop-up menu to choose one of the following options: • **Simultaneous**: The blocked course must be scheduled at the same time as the current course. If the same teacher

	instructs both courses, they must also be concurrent. Simultaneously blocked courses can have different attributes, such as numbers of sections, different frequencies, and different teachers. The courses can be scheduled at the same time with different teachers in different rooms. **Note:** The PowerScheduler engine propagates simultaneous relationships amongst courses that share a simultaneous relationship and have the same number of sections. For example, if Course A is blocked simultaneously with Course B, Course B is blocked simultaneously with Course C, and courses A, B, and C have the same number of sections, there is no need to add a simultaneous block relationship between Course A and Course C. • **Before or After**: The blocked course must be scheduled either before or after the current course. • **Before**: The selected course must be scheduled before the course you associate using the Course Number field. The blocked course selected in the Course Number field must be scheduled after the current course. • **After**: The selected course must be scheduled after the course you associate using the Course Number field. The blocked course selected in the Course Number field must be scheduled before the current course. • **Different Terms**: Two courses occur on the same days and periods, but in different terms. • **Combine Into**: Combine courses that have different student requests but have the same teacher and the same attributes, such as frequency, periods per meeting, valid start periods, and number of sections. Since the PowerScheduler engine processes combined courses as a single course, select an "anchor" course in the Course Number field from which you can combine additional courses. For example, a combined block relationship is applied to English I, English II, English III, which are all are taught by the same teacher but were requested by different students. Those three courses will be scheduled at the same time with the same teacher in the same room.

	When editing course relationships for English II and English III, associated English I as the anchor course for each combined relationship. • **Opposite Days**: Two courses occur during the same period and term, but on alternate days. • **Section**: The blocked course must have the same students in each section as the current course. For example, all students in section 1 of the blocked course must be in section 1 of the current course.

7. Click **Submit**. The Course Relationships page appears.

Calculate Target Number of Sections to Offer

Use the Calculate Target Number of Sections to Offer page if you want the system to calculate the recommended number of sections to offer for each course in the current catalog. When calculating the number of sections to offer for each course, PowerScheduler divides the total number of primary requests for that course by the maximum enrollment per section. Any remainders in this calculation are rounded up to provide the necessary number of sections for the number of requests. For example, if 215 students request a Biology course and the maximum number of students in each section is 25, the system calculates a need for 9 sections of Biology.

Before you continue, you must enter a value in the **Maximum Enrollment** field on the Course Information page. For more information, see *How to Define Scheduling Preferences*.

How to Calculate Target Number of Sections to Offer

The Calculate Target Number of Sections to Offer function calculates the recommended number of sections to offer for each course in the current catalog, based upon the number of course requests, the course maximum enrollment, and whether students may repeat the class in a given school year. Be sure to enter scheduling preferences for all of your courses before using this function. For more information, see *How to Define Scheduling Preferences*.

Note: To select a group of course see **PowerScheduler** > **Functions** > **Update Selections** > Choose **ScheduleCourseCatalog** from the **Current Table** pop-up menu > **Select Records by Hand** > Hold down the COMMAND key to make multiple selections > **Submit**.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Calculate Target Number of Sections to Offer**. The Calculate Target Number of Sections to Offer page appears.
4. Do one of the following:
    - Select the **All courses** option to perform the function for all courses.
    - Select the **Selected courses** option to perform the function for a selected group of courses.
5. Click **Submit**. The Changes Recorded page appears.

Teacher Scheduling Information

You must enter and define scheduling setup information for every teacher who instructs at least one course at your school. In addition, you can assign teachers to the courses they will be teaching. For more information, see *Teacher Scheduling Setup* and *Teacher Assignments*.

Teacher Scheduling Setup

To set up teachers for scheduling, set teacher scheduling preferences and view teacher constraints to determine if the constraints need to be modified.

How to Set Teacher Scheduling Preferences

When you set teacher scheduling preferences, there are a few fields that lend themselves to mass updating, such as Use for Scheduling. However, because the majority of the information needs to be set individually, it does not make sense to use the Update Selections tool in this area in most cases.

Repeat this procedure for every teacher at your school who will be instructing at least one course next schedule year.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Preferences** from the pop-up menu.
    - Click the **Preferences** tab.

    The Teacher Scheduling Preferences page appears.

5. Use the following table to enter information in the fields:

Field	Description
Department	Click **Associate** to select this teacher's department.
Preferred Room	Click **Associate** to select this teacher's classroom. The system always attempts to schedule courses assigned to this teacher in his or her preferred classroom first.
Maximum Consecutive Periods	Use the pop-up menu to choose the maximum number of periods this teacher can teach in a row (according to his or her contract).
Schedule This Teacher	Select the checkbox if you want the system to include this teacher when scheduling. **Note:** If you deselect the checkbox, the system will not include this teacher in the schedule build process.
Is Always Free?	Select the checkbox to allow this teacher to be scheduled for an unlimited number of courses during the same period. For example, some special education teachers teach different subjects to different students in the same room during the same period.
Schedule For Lunch	Select the checkbox if you want this teacher to be scheduled for a lunch period. For more information, see *Scheduled Lunch*.
Building Code (optional)	Click **Associate** to select this teacher's building.
House Code (optional)	Click **Associate** to select this teacher's house.
Team Code (optional)	Use the pop-up menu to choose the team to which you want this teacher to belong. **Note:** If there is a number to the right of the blank Team Code pop-up menu, the teacher was previously associated with a team

	at a different school. You must clear the Team Code field using the *Update Selections* function.
Maximum Student Load	Enter the maximum number of students that a teacher can have per day. This overrides the value of the Teacher's Maximum Daily Student Load, which is set at the district level. For more information, see *Miscellaneous District Settings*. Entering a value in this field does not prevent the teacher from being over-scheduled but only allows for reporting on the teachers whose schedules exceed the specified maximum student loads.

6. Click **Submit**. The Changes Recorded page appears.

How to View Teacher Constraints

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Constraints** from the pop-up menu.
    - Click the **Constraints** tab.

    The Teachers Constraints page appears.

    Note: For information about how to add, modify, or delete a teacher's constraints, see *Build Constraints*.

Teacher Assignments

Creating teacher assignments is a very important part of the scheduling process. Teacher assignments define which courses and how many sections of each course a teacher will instruct.

To enter teacher assignments, use one of the following methods:

- Select a teacher, enter all of his or her assignments, and go to the next teacher.
- Select a course, enter the teachers who will be teaching it, and go to the next course.

If you enter or edit an assignment for a teacher or course, the system automatically updates the information in both places.

How to Assign Teachers to Courses

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Assignments** from the pop-up menu.
    - Click the **Assignments** tab.

    The Teachers Assignments page appears.

5. Click **New**. The Edit Teacher Assignment page appears.
6. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select a course from the active course catalog.
Section Type	If appropriate for the course you selected, use the pop-up menu to choose the section type you want to assign to this teacher, such as **Spanish** or **SPED**. If you use section types, you must indicate which teachers teach what section types. For example, if Teacher A teaches the Spanish section (section type) of course 100, choose Spanish and enter **1** in the Number of Sections field. If Teacher B teaches two sections of course 100 with only one of the two being a Spanish section type, you need to create two teacher assignments. For one, choose **Spanish** for the section type and enter **1** in the Number of Sections field; for the other, leave the Section Type field blank and enter **1** in the Number of Sections field.
Number of Sections	Enter the number of sections of the course this teacher will instruct.

Schedule Term Code	Use the pop-up menu to choose the schedule term in which this course is taught. **Note:** This field only applies to courses that are not full-year courses. For example, assume one teacher is instructing three sections of a single semester course. If you want two sections to meet Semester 1 and one section to meet Semester 2, enter two teacher assignments for the course. For one assignment, choose **S1** in this field and enter **2** in the Number of Sections field. For the other, choose **S2** in this field and enter **1** in the Number of Sections field. If you do not choose a term, the system decides in which term to schedule the course.

7. Click **Submit**. The teacher's Teacher Assignments page appears.

How to Assign Courses to Teachers

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
    - Choose **Assignments** from the pop-up menu.
    - Click the **Assignments** tab.

    Any teacher assignments previously entered for this course appears.

5. Click **New**. The Edit Course Assignment [course name] page appears.
6. Use the following table to enter information in the fields:

Field	Description
Teacher	Click **Associate** to select the name of the teacher to whom you want to assign this course.

Section Type	If appropriate for the course you selected, use the pop-up menu to choose the section type you want to assign to this teacher, such as **Spanish** or **SPED**. If you use section types, you must indicate which teachers teach what section types. For example, if Teacher A teaches the Spanish section (section type) of course 100, choose Spanish and enter **1** in the Number of Sections field. If Teacher B teaches two sections of course 100 with only one of the two being a Spanish section type, you need to create two teacher assignments. For one, choose **Spanish** for the section type and enter **1** in the Number of Sections field; for the other, leave the Section Type field blank and enter **1** in the Number of Sections field.
Number of Sections	Enter the number of sections of the course this teacher will instruct.
Schedule Term Code	Use the pop-up menu to choose the schedule term in which this course is taught. **Note:** This field only applies to courses that are not full-year courses. For example, assume one teacher is instructing three sections of a single semester course. If you want two sections to meet Semester 1 and one section to meet Semester 2, enter two teacher assignments for the course. For one assignment, choose **S1** in this field and enter **2** in the Number of Sections field. For the other, choose **S2** in this field and enter **1** in the Number of Sections field. If you do not choose a term, the system decides in which term to schedule the course.

7. Click **Submit**. The [course name] page appears.

How to View Teacher Assignments

Use this procedure to view teacher assignments for a specific teacher.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
   - Choose **Assignments** from the pop-up menu.
   - Click the **Assignments** tab.

   The Teachers Assignments page appears.

   Note: To edit or delete a teacher assignment, click the course number on the Teacher Assignments page or the teacher name on the [course name] page. Edit the assignment and click **Submit** or click **Delete** to remove the assignment.

How to View Teacher Assignments by Course

Use this procedure to view all teacher assignments for a specific course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
   - Choose **Assignments** from the pop-up menu.
   - Click the **Assignments** tab.

   Any teacher assignments previously entered for this course appears. The following information displays for each assignment:

   - Target Number of Sections to Offer
   - Teacher Name
   - Count
   - Section Type
   - Terms
   - Department
   - Room

Teacher Schedule

View a teacher's schedule, including courses, sections, and enrollment per section. You can add or delete sections from a teacher's schedule. In addition, you can modify a section, such as locking it to prevent the section from being changed when the system rebuilds the master schedule.

How to Add a Section to a Teacher Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Schedule** from the pop-up menu.
    - Click the **Schedule** tab.

    The Teacher Schedule page appears.

5. Click **New**. That teacher's Edit Section page appears.
6. Use the following table to enter information in the fields:

Field	Description
Teacher name	The name of the selected teacher appears.
Course Number	Click **Associate** to select a course from the active course catalog.
Term	Choose the term for the course from the pop-up menu.
Schedule	Select the checkboxes for the expressions for the appropriate days on which the staff member teaches this section. **Note:** The schedule expression is the combination of periods and days.
Room	Click **Associate** to select a room in which the staff member teaches this section.
Section number	Enter a unique section number for this section. Select the **Locked Section** checkbox if the section should not be rescheduled during the next build.

Close section at max	Identifies whether to enroll students into the section even if the maximum enrollment has been reached. If this is selected, no students will be enrolled if the current enrollment is equal to or greater than the maximum enrollment. Select the checkbox to not accept more enrollments than the maximum number of enrolled students.
Section type	Identifies the section as open only to be filled by students whose course requests are designated as the same section type. Choose the type of section, such as Bilingual, from the pop-up menu (optional). **Note:** For more information, see *How to Add a Section Type*.
Grade Level	Enter the grade level of this section.
Current enrollment	The current enrollment of students in this section appears.
Maximum enrollment	Enter the maximum number of students that can enroll in this section.
Team	Choose the team associated with this section from the pop-up menu.
House	Click **Associate** to select a team to which this section belongs.
Where Taught	Enter the school ID if the section is taught at a different school.
Dependent sections	Enter any dependent sections for this section. Separate multiple sections with commas.
Exclude From Attendance	Select the checkbox if you do not want to include this section in the student ADM/ADA counts.
Grade Scale	Choose the grade scale from the pop-up menu.

Maximum Load Status	Use the pop-up menu to indicate whether the section should be exempt from counting towards a teacher's maximum student load: • **Exempt**: Students enrolled in this section do not count towards a teacher's maximum student load. • **Lab**: Same as non-exempt. • **Non-Exempt:** Students enrolled in this section count towards a teacher's maximum student load. **Note:** At this time, the Non-Exempt selection is not saved on this page. Use Direct Database Export to set sections as non-exempt. In the Sections table, set the Max_Load_Status field to **Non-Exempt**. For more information, see *Teacher Maximum Load*. **Note:** For existing non-exempt sections and for all new sections, no values are stored for this field unless they are set to **Lab** or **Exempt** on this page, or they set to any of the three status types using Direct Database Export. Sections with no values are ignored when calculating the teacher maximum load.
Exclude from GPA?	Select the option to either include or exclude the grade from the GPA calculation.
Exclude from class rank?	Select the option to either include or exclude the grade from the class rank calculation.
Exclude from honor roll?	Select the option to either include or exclude the grade from the honor roll calculation.

7. Click **Submit**. The teacher's Schedule page displays the new section.

How to Edit a Section on a Teacher Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:

- Choose **Schedule** from the pop-up menu.
- Click the **Schedule** tab.

The Teacher Schedule page appears.

5. Use the following table to filter information:

Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Filter</td><td>1. Enter search criteria in the Search field.
2. To filter by columns:
a. Click +.
b. From the first pop-up menu, choose one of the following:
• Course
• Expression
• Max
• Students
• Room
• Section #
• Section Type
• Team
• Term
c. From the second pop-up menu, choose the appropriate comparator:
• contains
• contains all
• contains any
• does not contain
• is empty
• starts with
• starts with any
d. Enter search criteria in the search field.

Note: Use a comma-separated list for multiple values. If contains is selected, only one value may be entered. If is empty is selected, no value may be entered.</td></tr>
</table>

	e. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. 3. Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. 4. To add another filter, click **+** and repeat Step 1. **Note:** The **+** appears shaded if all filters have been added. 5. To delete a filter, click **-** next the filter. 6. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

Note: Click the number in the **Students** column to view the class roster for the section.

6. Click the number in the **Section #** column for the section you want to edit. That teacher's Edit Section page appears.
7. Edit information as needed. For field descriptions, see *How to Add a Section to a Teacher Schedule*.
8. Click **Submit**. The teacher's Schedule page displays the edited section.

How to Delete a Section From a Teacher Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Schedule** from the pop-up menu.
    - Click the **Schedule** tab.

   The Teacher Schedule page appears.

Note: Click the number in the Size column to view the class roster for the section.

5. Click the number in the Section # column for the section you want to delete. That teacher's Edit Section page appears.
6. Click **Delete**. The teacher’s Schedule page appears.

Teacher Schedule Matrix

The teacher matrix function creates a visual, graphical representation of a teacher's schedule. This schedule can be printed, though not for more than one teacher at a time.

How to View the Teacher Schedule Matrix

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Matrix** from the pop-up menu.
    - Click the **Matrix** tab.

    The Teacher Schedule Matrix page displays the teacher's schedule for each period and day in each term. Identical colors on the schedule indicate the same section. A blank block means that nothing is scheduled for that block in that term. If all matrix preferences are selected, each block includes the following information:

    - Name of the course
    - Course number
    - Section number
    - Room number
    - Expression, which is the combination of periods and days
    - Year term
    - Number of students scheduled for this section
    - Maximum enrollment of this section

    To change the matrix preferences, see *How to Set Teacher Schedule Matrix Preferences*.

How to Set Teacher Schedule Matrix Preferences

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Teachers** from the PowerScheduler menu. The Teachers page appears.
3. Click the name of the teacher you want to work with from the teachers menu.
4. Do one of the following:
    - Choose **Matrix** from the pop-up menu.
    - Click the **Matrix** tab.

    The Teacher Schedule Matrix page

5. Click **Matrix Preferences**. The Teacher Schedule Matrix Preferences page appears.
6. Use the following table to enter information in the fields:

Field	**Description**
Course Name	Select the checkbox to display the course name.
Course Number.Section Number	Select the checkbox to display the course and section numbers.
Room	Select the checkbox to display the room number.
Expression Term	Select the checkbox to display the expression, which is the period and day combination.
Enrollment	Select the checkbox to display enrollment information, which is the number of students enrolled and the maximum enrollment.

7. Click **Submit**. The Teacher Schedule Matrix page displays the items selected on the Teacher Schedule Matrix Preferences page.

Scheduled Lunch

To schedule time for lunch or teacher-supervised breaks in your school's master schedule, create lunch sections. Lunch sections are sections of a course that have been designated for lunch periods. To schedule students for lunch, a lunch course request must exist for each student before loading student schedules.

Start by creating a lunch course in PowerScheduler, indicating that it will be used exclusively for scheduled lunches. Then, create sections for that course. Select the periods that each section of the lunch course will span and the days on which it occurs. For more information about specifying that a course is used for scheduling lunch, see *Course Scheduling Setup*.

For each section of a lunch course, PowerScheduler can assign a teacher to supervise during lunchtime. If supervision is not necessary, scheduling teachers for lunch ensures that the teachers will have time set aside for their own lunch break. Teachers can be assigned to only one lunch section per day, though that section can span several periods. Teachers are scheduled for one section of the lunch course for each day combination and term specified by the lunch course.

For example, a five-day, quarterly schedule where lunch can be periods 3, 5, or 7, set up the lunch course with a frequency of five, valid terms for each quarter, and valid start periods selected for 3, 5 and 7. Each teacher can be scheduled for one of 20 lunch sections (one for each day and term) that will start in either period 3, 5, or 7 in the respective day and term combination. For more information about scheduling a teacher for lunch, see *Teacher Scheduling Setup*.

Students can also request lunch courses. Each student must request the lunch course for each day combination and term. Students will be loaded into lunch sections that have no assigned teacher. Using the earlier example, students also have 60 sections in which they can be scheduled (three per day per term).

Though PowerScheduler schedules lunch courses in the same manner as other courses, you can filter lunch courses for certain reports and functions. When defining course scheduling preferences, specify that the course is excluded from report cards and transcripts. The course will not appear on those object reports. Also, lunch courses are not included in functions such as splitting year-long courses.

If you use the lunch functionality for any other teacher scheduling purpose, remember that you can only have one lunch course and that it must follow the same rules as scheduled lunch. That is, there should be only one period of time each day of the year in which teachers are assigned to this activity.

Automated Study Hall

The Automated Study Hall function provides study hall periods to students with incomplete schedules. Automated Study Hall creates a study hall course and sections into which students, teachers, and rooms are scheduled.

How to Run the Automated Study Hall Function

Perform this function only after you build and load a master schedule. Also, set up a Study Hall course before creating study hall sections. For more information, see *New Courses*.

To set up study hall for a selected group of students, first select the group of students. For more information, see *Schedule Search and Select*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Automated Study Hall** from the PowerScheduler menu. The Automated Study Hall Parameters page appears.
3. Use the following table to enter information in the fields:

Field	Description
Run For	Choose whether you want to set up study hall sections for all students or only for the selected students.
Terms	Click **Associate** to select the terms in which you want to set up study hall sections. The terms available include only those terms in the active scenario.
Course	Click **Associate** to select a course from which you will create study hall sections. The courses available include only those courses in the active catalog.
Rooms Allowed	Click **Associate** to select the rooms that can be used for study hall sections. The rooms available include only those that are selected to be scheduled and are associated with the selected school. Select the **Allow Multiple Sections Per Room** checkbox if there can be more than one section in a particular room at the same time.
Teachers Allowed	Click **Associate** to select the teachers that can be scheduled for study hall sections. The teachers available include only those that are selected to be scheduled and are associated with the selected school.

	Select the **Allow Exceed Max-in-a-Row for Teachers** checkbox to override the maximum number of periods in a row on a teacher's schedule.
Max Number of Students per Section	Enter the maximum number of students that can be scheduled into a study hall section.
Periods Allowed	Click **Associate** to select the periods in which study hall sections can be scheduled. The periods available include only those in the active scenario.
Day Pattern List	Click **Add** and select a day pattern on which study hall sections can be scheduled. That way, PowerScheduler can be more efficient by setting up study hall sections that span multiple days, if possible. For example, a five-day schedule could include the day patterns MWF, TR, and MTF. PowerScheduler would first find the students that have free periods that fit a given day pattern. Then, for each period in the master schedule, it creates the appropriate number of study hall sections that occur on each day in the day pattern. Assuming the maximum number of students per section is 25, the day pattern MWF would produce study hall sections as follows: • Period 1: Two sections each on Monday, Wednesday, and Friday • Period 2: Zero sections • Period 3: One section each on Monday, Wednesday, and Friday Click **Add** for each day pattern you want to identify. Click **Modify** or **Delete** to edit or remove a day pattern. **Note:** The default day pattern, if none is entered, is one that reflects all the days in the schedule. In this case only those students who have an unscheduled meeting period that occurs on all days in the schedule will be enrolled in a study hall. For example; if a student is unscheduled during period 3 on both days of an A/B schedule, then the student will be enrolled. If a student

	is unscheduled during period 3 on only Day A, then the student will not be enrolled in a study hall.

4. Click **Create**. The Automated Study Hall Parameters page appears.

How to View the Automated Study Hall Results Log

After setting up study hall parameters, you can view the results of the study hall setup.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Automated Study Hall** from the PowerScheduler menu. The Automated Study Hall Parameters page appears.
3. Click **View last results log**. The Automated Study Hall - Results Log page displays the date and time the of the last study hall run and the parameters and values set for that run.

   Note: For descriptions of these parameters, see *How to Run the Automated Study Hall Function*.

   The following information appears in the Results section of the Automated Study Hall - Results Log page:

Field	Description
Students found with schedule holes	The number of students whose requests were fulfilled but whose schedules have open periods.
Total students fully scheduled	The number of students who had all unscheduled time filled with study hall sections as a result of the last Automated Study Hall run.
Total students not fully scheduled	The number of students who did not have all unscheduled time filled with study hall sections as a result of the last Automated Study Hall run.
[Study Hall Sections]	For each study hall section created, the following information appears:

	• Section # • Expression • Term • Teacher • Room • Size

4. Click **Back** to return to the Automated Study Hall Parameters page.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

Build Constraints Overview

Build constraints restrict the way the system schedules a course in the master schedule. Use constraints to tell the system exactly how you want to build your schedule.

PowerSchool includes many types of build constraints you can define. Use each constraint to constrain the schedule in a specific way. For example, use a Teacher Free constraint if you want the football coach to have a free period at the end of the day during the fall semester. Alternatively, to preschedule the Wind Ensemble course at a particular time and place, use a Pre-Schedule constraint.

Note: Since constraints restrict the schedule, the more constraints you define, the less flexibility the system has to build your schedule and the less optimal the resulting schedule will be. It is always best to use the fewest number of constraints required to accomplish your scheduling goals.

The most common constraints are Pre-Schedule and Teacher Free. There are also constraints to manage course and teacher teams and to restrict the meeting times of courses.

You do not have to define any constraints if you can build a satisfactory master schedule without them. Schools often start building schedules with only a few constraints, then gradually add new ones to refine the schedule and achieve particular results.

After creating constraints, you can edit and delete them as necessary. For more information, see *Work with Build Constraints*. In addition to build constraints, you can set constraints during the load process. For information about load constraints, see *Load Constraints*.

Build Constraints

Build constraints restrict the actual building of the master schedule. To view a list of build constraints and the number of each that have been defined for your schedule, choose **Build Constraints** from the constraints menu. For teacher-related build constraints, see *Teacher Build Constraints*.

How to Add a Course Optimize Constraint

Use a Course Optimize constraint to override the global sampling parameters when scheduling a specific course. For example, if you have a course that you know will be very difficult to schedule, increase both the minimum number of combinations to sample and sampling percentage using this constraint.

Note: You can only define one Course Optimize constraint per course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Course Optimize**. The Course Optimize Constraints page appears.
4. Click **New**. The Edit Course Optimization page appears.
5. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the course you want to optimize.
Minimum number of combinations to sample	Enter the minimum number of combinations you want the system to sample when scheduling this course into the master schedule. For example, if this field on the Edit Build Scenario page is set for 10,000 and you have a course you know will be difficult to schedule, enter **50,000** so that the system will evaluate five times as many combinations as it does for your other courses.
Sampling Percentage	Enter the percentage of combinations you want the system to sample when scheduling this course into the master schedule. For example, if this field on the Edit Build Scenario page is set for 75% and you have a course you know will be difficult to schedule, enter **100** to have the system evaluate all possible combinations.

6. Click **Submit**. The Course Optimize Constraints page appears.

How to Add a Course Restriction Constraint

Use a Course Restriction constraint to restrict sections of a course to particular periods and days or to meet any time except the specified periods and days.

For example, use this constraint to force three sections of a five-section course to schedule at the same time. The system normally spreads the sections out over different periods. With this constraint, you can force them to be scheduled where you want.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Course Restrict**. The Course Restrictions Constraints page appears.
4. Click **New**. The Edit Course Restriction page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Course Number	Click **Associate** to select the number of the course you want to restrict.
Term	Use the pop-up menu to choose to which term you want this constraint to apply.
Schedule	Select the checkbox next to each period in each day that you want this course to be taught.
Applies to days only	Select the checkbox to apply this constraint to only the days specified in the Schedule checkboxes. The system does not consider periods and terms for this constraint.
Applies to periods only	Select the checkbox to apply this constraint to only the periods specified in the Schedule checkboxes. The system does not consider days and terms for this constraint.

Minimum Number of Sections	Enter the minimum number of sections you want to restrict. **Note:** If the Minimum Number of Sections and Maximum Number of Sections fields are both 0, then this course can be taught in any period or day except the ones indicated.
Maximum Number of Sections	Enter the maximum number of sections you want to restrict. **Note:** If the Minimum Number of Sections and Maximum Number of Sections fields are both 0, then this course can be taught in any period or day except the ones indicated.
Section Type	If the course section you want to restrict has a section type, use the pop-up menu to choose it. If a course has five sections and the two sections you want to restrict contain section types, you must create two constraints.

6. Click **Submit**. The Course Restrictions Constraints page appears.

How to Add a Course Room Constraint

Use a Course Room constraint to assign a course to a particular room. For example, you could force the Computer-Aided Drafting class to be taught in the Computer Lab rather than the Shop.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Course Room**. The Course Room Constraints page appears.
4. Click **New**. The Edit Course Room Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the number of the course you want to assign to a particular room.

Room	Click **Associate** to select the room in which you want this course to be scheduled.
Teacher	Click **Associate** to select the teacher who will be instructing this course. **Note:** This constraint only applies to the sections of this course taught by the teacher you select. If you do not select a teacher, this constraint applies to all sections of the selected course.

6. Click **Submit**. The Course Room Constraints page appears.

How to Add a Course Team Constraint

Use a Course Team constraint to block teachers and courses together so that certain courses can only be taught at the same time as certain other courses. For example, a jazz band instructor can only teach a jazz band course when a jazz choir instructor leads a jazz choir class (or vice versa).

A blocking course relationship requires Course 1 and Course 2 to have the exact same number of sections. A Course Team constraint allows Course 1 and Course 2 to offer different numbers of sections, as long as there is at least one section of each using the blocking specified. For more information, see *Course Information*.

Note: The order of the courses is irrelevant when creating this constraint.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Course Team**. The Course Team Constraints page appears.
4. Click **New**. The Edit Course Team Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Course Number 1	Click **Associate** next to the Course Number field to select the name of the first course you want to team together.

Teacher	Click **Associate** next to the Teacher field to select the name of the teacher instructing this course.
Course Number 2	Click **Associate** next to the Course Number field to select the name of the course you want to team with Course Number 1.
Teacher	Click **Associate** next to the Teacher field to select the name of the teacher instructing Course Number 2.
Simultaneous Blocking?	Select the checkbox if you need these two courses to be scheduled at the same time. Otherwise, any other blocking course relationship (such as Before or After) prevails. **Note:** For more information, see *Course Information*.
Same Room?	Select the checkbox to force both courses to be scheduled in the same room.
Minimum Number of Teaming Sections	Enter the minimum number of sections of these courses that will be teamed together. For example, if each course has four sections but you enter **2** in this field, then only two of the four sections will be teamed.

6. Click **Submit**. The Course Team Constraints page appears.

How to Add a Pre-Schedule Constraint

Use a Pre-Schedule constraint to schedule sections of a course ahead of time when you already know exactly when and where they must meet in the master schedule. For example, use this constraint to schedule sections of Band in sixth and seventh periods, which is the only time the band teacher is available.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Pre-Schedule**. The Pre-Schedule Constraints page appears.
4. Click **New**. The Edit Pre-Schedule Constraint page appears.

5. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the number of the course you want to preschedule.
Schedule	Use the pop-up menu to select the term in which this constraint applies. Select the checkbox next to each period in each day that you want to schedule this course. For example, if you have a one-day schedule and select Period 1 and Period 2, a section of this course will span periods 1 and 2 every day. Alternatively, if you have a two-day schedule and select Period 1 for both days, the section will meet every day during first period.
Room	Click **Associate** to select the number of the room in which you want to preschedule this course.
Teacher	Click **Associate** to select the name of the teacher who instructs the course you want to preschedule.
Section Type	If the section of the course you want to preschedule has a section type, use the pop-up menu to choose it. **Note:** To preschedule two sections of the same course, one of which has a section type, you must create two constraints.
Team Code	If the section of the course you want to pre-schedule is associated with a teacher team, use the pop-up menu to choose it.

6. Click **Submit**. The Pre-Schedule Constraints page appears.

How to Add a Room Free Constraint

Use a Room Free constraint to block a room from being scheduled for a particular term, day, and period. For example, use this constraint to keep a classroom free during the last period of the day for after-school detention.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Room Free**. The Room Free Constraints page appears.
4. Click **New**. The Edit Room Free Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Room	Click **Associate** to select room you want to keep free when scheduling.
Schedule	Use the pop-up menu to select the term in which this constraint applies. Select the checkbox next to each period in each day that you want to keep this room free. For example, select the checkboxes across the first row if you want to keep the room free during the first period of each day.

6. Click **Submit**. The Changes Recorded page appears.

How to Add a Schedule Break Constraint

Use a Schedule Break constraint to add flexibility to teachers' max-in-a-row count. For example, if your teachers can instruct a maximum of three periods in a row, work around this by putting a 10-minute homeroom period after Period 2. This would make it possible to schedule teachers for Periods 1 through 5.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.

3. Under Build Constraints, choose **Schedule Break**. The Schedule Break Constraints page appears.
4. Click **New**. The Edit Schedule Break Constraint page appears.
5. Choose the period after which you want to insert a break in the schedule from the pop-up menu.
6. Click **Submit**. The Schedule Break Constraints page appears.

Teacher Build Constraints

Teacher-related build constraints consider teachers' restrictions when building a master schedule. To view a list of build constraints and the number of each that have been defined for your schedule, choose **Build Constraints** from the constraints menu. For other build constraints, see *Build Constraints*.

How to Add a Teacher Dovetail Constraint

Use a Teacher Dovetail constraint to fit partial courses together during the same period so that they take up less room.

For example, Course 1 is a partial course that meets three times during a six-day schedule cycle. Course 2 is a partial course taught by the same teacher and also meets three days in the cycle. Use this constraint to force both courses to meet during the same period, but on alternate days. Together the partial courses act as a full course, allowing greater flexibility in that teacher's schedule.

Note: You only have to define this constraint for one of the courses you want to fit together with another course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Teacher Dovetail**. The Teacher Dovetail Constraints page appears.
4. Click **New**. The Edit Teacher Dovetail Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the name of one of the courses you want to dovetail with another.

Teacher	Click **Associate** to select the name of the teacher who instructs this course. Only the sections of the course taught by this teacher will be constrained. **Note:** If you do not select a teacher, all sections of the course you selected will be constrained.

6. Click **Submit**. The Teacher Dovetail Constraints page appears.

How to Add a Teacher Free Constraint

Use a Teacher Free constraint to specify those periods when a teacher must be free, such as when teaching at another school. This is the opposite of the Teacher Part-Time constraint.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Teacher Free**. The Teacher Free Constraints page appears.
4. Click **New**. The Edit Teacher Free Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Teacher	Click **Associate** to select the name of the teacher who you want to be free during certain periods of the day.
Schedule	Use the pop-up menu to choose the term to which you want to apply this constraint. Select the checkbox next to each period in each day that you want this teacher to be free.

6. Click **Submit**. The Teacher Free Constraints page appears.

How to Add a Teacher Part-Time Constraint

Use a Teacher Part-Time Constraint to define which periods a part-time teacher is available to be scheduled. This is the opposite of the Teacher Free constraint.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Teacher Part-Time**. The Teacher Part-Time Constraints page appears.
4. Click **New**. The Edit Teacher Part-Time Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Teacher	Click **Associate** to select the name of the teacher who is on a part-time schedule.
Beginning Period	Choose the period that this teacher is available from the pop-up menu.
Ending Period	Choose the last period that this teacher is available from the pop-up menu.
Maximum Consecutive Periods	Enter the maximum number of consecutive periods this teacher is available. This setting works in conjunction with the **Beginning Period** and **Ending Period** fields. For example, assume you have selected 1 for the Beginning Period and 7 for the Ending Period and 4 for the Maximum Periods field. This teacher would be available for periods 1-4, 2-5, 3-6, or 4-7.

6. Click **Submit**. The Teacher Part-Time Constraints page appears.

How to Add a Teacher Team Constraint

Use a Teacher Team constraint to allow teachers to teach course sections outside of their own team. For example, if a teacher belongs to the Team 1but also must teach a section for the Team 2, define this constraint to allow Team 2 students to be scheduled with this teacher for a particular course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Build Constraints, choose **Teacher Team**. The Teacher Team Constraints page appears.
4. Click **New**. The Edit Teacher Team Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Course Number	Click **Associate** to select the number of the course you want to link to a teacher.
Team Code	Choose the appropriate teacher team code from the pop-up menu.
Teacher	Click **Associate** to select the name of the teacher who will be teaching outside of his or her assigned team.
Number of Sections	Enter the number of course sections you want this teacher to teach outside of his or her assigned team.

6. Click **Submit**. The Teacher Team Constraints page appears.

Work with Build Constraints

Use the PowerScheduler menu to view build constraints by type or to modify or delete build constraints.

To view constraints that affect courses, sections, students, or teachers, choose the appropriate resource from the PowerScheduler menu. Then, view the constraints either by choosing **Constraints** from the pop-up menu or by clicking **Constraints** on the page. The Constraints page displays all constraints that affect that resource, regardless of type.

How to Modify Build Constraints

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Click the name of the type of constraint you want to modify, such as **Course Optimize**.
4. Click the course name, student name, teacher name, or period number in the row of the constraint you want to modify. The Edit page for that particular constraint appears.
5. Edit the information as needed.
6. Click **Submit**. The appropriate constraints page appears.

How to Delete Build Constraints

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Click the name of the type of constraint you want to delete, such as **Course Team**.
4. Click the course name, student name, teacher name, or period number in the row of the constraint you want to delete. The Edit page for that particular constraint appears.
5. Click **Delete**. The appropriate constraints page appears.

Course Rank

Building a course rank is the last step before building the master schedule.

The course rank file defines the order in which the system schedules courses into the master schedule. The rank is a value that a course is given according to how difficult it is to schedule. As the system fills the master schedule with courses during the build, it becomes more and more difficult to schedule each successive course. Therefore, the order in which the system schedules courses is important. The best course rank places the courses that are the most difficult to schedule at the beginning of the build process and saves the courses that are easiest to schedule for the end.

For example, singletons (courses that are offered only once per term) are scheduled before regular courses because they are more difficult to fit in a schedule. The system schedules prescheduled courses first, and then schedules singletons, doubletons, core sections, and electives.

Demand for a course (the number of student course requests) and constraints on a course affect course rank. The system initially builds the course rank based on constraints and other parameters that you defined.

It is important to keep the course rank file up-to-date as you build your schedule and adjust your courses, teachers, constraints, and other parameters.

The first time you build the course rank, the system creates a rank file. As you build your schedule and adjust parameters, such as courses, teachers, and constraints, the rank file needs to be updated. For more information, see *Build Course Rank*.

Build Course Rank

When you initially build the course rank, the system displays the courses in the order the system has determined, based on the course definitions and constraints.

The system assigns a sequential number to each course to indicate its place in rank using numbers in increments of ten, such as 10, 20, 30. The smaller the number, the higher the course rank.

Use this numbering system to edit the ranks of courses and put courses between system-defined ranks. For example, you can re-rank a course to 11, 12, or 13 without affecting the ranks of the system-defined courses ranked at 10 and 20.

After building the course rank and making modifications, you may need to rebuild the course rank. Rebuilding the course rank overwrites any changes you have made to the rank file. Rebuild the course rank after you add or delete a course. If you rebuild the rank, you will lose any edits you made. Be sure to make note of those changes so that you can re-create them in the rebuilt course rank. To rebuild the course rank, see *How to Build Initial Course Rank*. To rebuild the rank without updating your manual changes, use the Update Rank function. For more information, see *Update Rank*.

How to Build Initial Course Rank

Use this function to set up an initial course rank or rebuild a course rank. This will overwrite any manual changes to the course rank.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Course Rank** from the PowerScheduler menu. The Course Rank page appears.
3. Click **Build Rank**. The Confirm Build Course Rank page appears.
4. Click **Submit**. The Course Rank page appears.

How to Edit a Course Rank

After creating an initial rank file, you can modify, update, and rebuild it. These are the final steps before building the master schedule.

The system evaluates all factors that affect courses to determine the best course rank. After the system builds the course rank, you can make manual adjustments based on your own experience or special circumstances not reflected in the parameters and constraints you defined. The rank you manually give a course overrides the rank assigned by the system.

For example, the system calculates a course rank of 90 for Concert Band based on the constraints you entered for this course compared to the constraints you entered for other courses. Due to experience in dealing with the conflicts band members face when trying to schedule Concert Band, you decide to change the rank of this class. By changing the rank from 90 to 5, you force other courses to schedule around Concert Band, reducing the chance of conflicts.

Note: You cannot change the rank of a course to be higher than a prescheduled course. Prescheduled courses are always the first courses scheduled.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Course Rank** from the PowerScheduler menu. The Course Rank page appears.
3. Use the following table to edit information in the fields:

Field	Description
Delete	Select the checkbox to delete this course from the course rank. **Note:** Only delete a course from the course rank if it is not going to be scheduled.
Sys Rank	The rank that the system determined for the course appears.
Rank	The rank that the system determined for the course appears. The Sys Rank value is the same as the Rank value if the course rank has not been manually changed.
Crs Num	The number of the course appears.

Crs Name	The name of the course appears.
Sections	The number of sections offered for the course appears.
PPC	The number of periods per cycle for the course appears.
Demand	The number of requests for the course appears.
Crs Conflicts	The number of unique courses among students who are requesting a particular course appears. The course in that row is not included in the calculation.
Stu Conflicts	The sum of all requests made by students who have requested the course appears.
Constraints	This field contains a dot if any constraints have been associated with the course. It is blank if the course has no constraints.
Comments	Enter any comments about why you are editing a particular course rank number.

4. Click **Submit**. The system displays the changes on the Course Rank page.

How to Update Rank

Update the course rank after you do any of the following:

- Edit the number of sections of a course.
- Significantly change the number of student course requests.
- Add or delete constraints.

Updating the course rank recalculates the system rank and updates the course rank for courses that you have not adjusted.

Note: To overwrite any manual changes and rebuild your entire course rank, rebuild the course rank. For more information, see *How to Build Initial Course Rank*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Course Rank** from the PowerScheduler menu. The Course Rank page appears.
3. Click **Update Rank**. The Confirm Update Course Rank page appears.
4. Click **Submit**. The Course Rank page appears.

Build Master Schedule Introduction

After you define all of the parameters and constraints outlined in the section *Prepare to Build the Master Schedule*, proceed by building the master schedule. When you build the master schedule, do the following:

- Validate the data you entered. For more information, see *Validate Build Scenarios*.
- Begin the build. For more information, see *Build the Master Schedule Overview*.
- Fix any issues the system finds when building the schedule. If the system stops the build, see *When the System Stops the Build*.
- Optimize the built schedule.
- Load students into the master schedule.
- Commit the master schedule for the next school year.

You can follow these steps several times to create the best possible master schedule. For example, you might build the schedule and realize you need to add some course sections. After adding the sections, rebuild the schedule. Then, you may find that you need to define a Teacher Part-time constraint, which restricts when the system can schedule a course to which a particular teacher is assigned. Add the constraint and build the schedule again.

You will most likely build the master schedule several times before committing it for the next school year. To ensure that your student schedules are complete, see *Checklist to Know Your Student Schedules are Complete*.

Complete the appropriate steps in *Prepare to Build the Master Schedule* before proceeding. There are five main steps you must complete in the following order when building the master schedule:

- Validate Build Scenarios
- Build the Master Schedule
- Load Constraints
- Load Students
- Commit the Master Schedule

Validate Build Scenarios

Before PowerScheduler builds your master schedule, you must validate the information that was entered. The validation process finds any errors in your data, such as too many sections assigned to a teacher.

The system checks the following:

- All courses selected as scheduled must be in the rank.

- All courses assigned to teachers must be in the rank.
- Each course has a room that will handle its capacity.
- Student course requests have been dropped if a course is not scheduled.

The validation process also alerts you to potential problems, such as students with no scheduled course requests or a teacher who has more periods assigned than periods available.

Before validating your build scenario, confirm that the build parameters are correct. For more information, see *Build Scenario Parameters*.

How to Validate a Scenario

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Build** from the PowerScheduler menu. The Build Schedule page appears.
3. Select the **Validate only** checkbox.
4. Click **Submit**. The engine starts to run. For more information, see *Understand the PowerSchool Scheduler Page*.
5. Make the necessary corrections using the steps described in the section *Build Validation*. Continue to validate your data until it is error-free.

Build Scenario Parameters

Before you validate your data, verify that the details of the build scenario are correct.

How to Confirm Build Scenario Parameters

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Scenarios** from the PowerScheduler menu. The Scenarios page appears.
3. Click the name of the build scenario you will use to build your master schedule. The Edit Build Scenario page appears.
4. Verify that the data in the following fields are correct: Build Name, Terms, Periods, Days, and Course Catalog. Make modifications, if necessary.
5. Make sure that the **Active Build** checkbox is selected.
6. Enter comments in the Build Description field to describe this scenario. If you build a master schedule using another scenario, comments make it easy to differentiate between the two.

Note: You can also use this field to denote changes as the build process progresses.

7. Click **Submit** to save any changes. The Scenarios page appears.

Load Validation

Validate the data in your schedule before loading. This process finds any errors that would prevent the system from loading a master schedule.

Note: The Import link does not appear on the Load Student Schedules Queue page if only validation was performed.

How to Validate Load Data

Before running a load, you should validate the data. The validation process finds any errors in your data and alerts you to potential problems.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Load** from the PowerScheduler menu. The Load Student Schedules Queue page appears.
3. Select the **Validate only** checkbox.
4. Click **Submit**. The engine starts to run. For more information, see *Understand the PowerSchool Scheduler Page*.
5. Under Processing, choose **(Q)** next to Load from the PowerScheduler menu. The Load Student Schedules Queue page appears.
6. Click **View** in the Results Log column of the appropriate load. The "Results Log for [school name]" page appears.
7. Make the necessary corrections and continue to validate your data until it is error-free.

Build Validation

Use the results log to identify any errors in your data. Items in the log can be of three types: information, warnings, and errors. All errors must be corrected before you begin building the master schedule. Though warnings do not need to be corrected, you may want to review them before building the master schedule.

When you start the validate process, the system checks the following types of data:

- Courses
- Students

- Blocks
- Constraints
- Parameters
- Teachers

The following table displays examples of error messages contained in the validation log:

Validation type	Error messages
Course	• Course has been dropped. Missing from course rank. Sections offered is zero. • Invalid minimum periods-per-day. • Invalid frequency. • Invalid maximum days-per-cycle. • Invalid term length. • Invalid schedule type. • Dropped course still listed in course rank. • Course is not flagged to be scheduled. • The assigned course number is not valid. • Requested course number is not a valid course flagged for scheduling.
Blocks	• Invalid block -courses can only be blocked in pairs (no chaining). • Invalid block - a course cannot have multiple blocking relationships.
Teachers	• Teacher is flagged for scheduling but has no teacher assignments. • Teacher has more periods assigned than periods available. • Teacher's max-in-a-row is zero. • Scheduled teacher has no scheduled assignments. • Invalid teacher. • Too many sections assigned to teachers. • Not enough sections assigned to teachers.
Students	• Scheduled student has no scheduled requests. • Student with requests is not flagged for scheduling.

	• Student is not flagged for scheduling but has requests.

Once you know where the errors in your data are, go back and correct them. For example, if the sign indicates that too many sections are assigned to a teacher, find the related course number and make the necessary changes. Then, validate your scenario until it is error-free.

Build the Master Schedule Overview

When building a master schedule, the goal is to satisfy the most student course requests possible while maintaining a good balance of students in course sections. PowerScheduler assigns each section to a period and schedules the sections into classrooms based on the teacher assignments. The system attempts to satisfy as many student course requests as possible, while respecting constraints and the course rank. Before you can build the master schedule, you must download and install the scheduling engine.

Plan to build the master schedule several times. After you build the schedule for the first time, you may find that you forgot to define a constraint or that you need to add sections to a course. Make those changes and build the schedule again. It is likely that you will make changes and rebuild several times before you have a satisfactory schedule.

After you decide on a master schedule, you have the option of allowing the system to optimize it. Then, finalize the master schedule before loading student schedules.

Download and Install the Scheduling Engine

When you install the scheduling engine, all of the necessary files download to your local computer. Complete the instructions for your specific type of computer.

Note: Occasionally, there are enhancements made to the scheduling engine. If you navigate to a PowerScheduler page and see a message about updating your engine, you must download the most recent engine.

Important Note: If you have previously installed the scheduling engine, uninstall it before re-installing an updated version.

How to Download the Scheduling Engine for Macintosh

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Engine Download** from the PowerScheduler page. The Engine Download page appears.
3. Click **PSSchedEngineInstall.dmg**. The scheduling engine disk image downloads.
4. Double-click the downloaded file, if necessary. The Install PowerSchool Scheduling Engine page appears.
5. Click **Continue**. The Choose Destination Location page appears.
6. Click the disk onto which you want to install the engine. Click **Choose Folder** to navigate to your preferred location.
7. Click **Continue**.
8. Click **Install**.

9. Click **Close** when the successful installation message appears.

   Note: If you are using Mac OS X 10.2.2 without the Security Update 2002-11-21 installed, the engine will not run properly. To install the security update, select Software Update in the Mac OS X System Preferences dialog, which is available from the Apple menu.

To continue the process of building a master schedule, see *Build the Master Schedule*.

How to Download the Scheduling Engine for Windows

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Engine Download** from the PowerScheduler menu. The Engine Download page appears.
3. Click **PSSchedEngineInstall.ZIP**. Depending on the type of computer you are using, different pages may appear. However, everyone must save the scheduling engine software.
4. When asked where to store the software, select a folder or directory.
5. Double-click **PSSchedEngineInstall.exe** to extract the file. The InstallShield Wizard page appears.
6. Click **Next**. The Choose Destination Location page appears.
7. Click **Browse** in the Destination Folder field to navigate your preferred location.
8. Click **Next**. The InstallShield Wizard Complete page appears.
9. Click **Finish**. The InstallShield Wizard page closes.

To continue the process of building a master schedule, see *Build the Master Schedule*.

Build the Master Schedule

After you prepare the master schedule, validate the build scenario you want to use, build the master schedule, and then optimize the master schedule. For information about data validation, see *Validate Build Scenarios*. For information about optimization, see *Optimize the Master Schedule*.

Note: It is recommended that you do not use Safari when building your master schedule.

How to Build the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Build** from the PowerScheduler menu. The Build Schedule page appears.

3. Select the **Build master schedule** option.
4. Select the **Use locked master records** checkbox if you are rebuilding the schedule after fixing an issue with a particular item, such as a course, room, or teacher, or if you manually entered any sections using the Sections link on the PowerScheduler menu. The system restarts the build at the course it was scheduling when the build stopped, leaving where they were originally scheduled all of the courses it had scheduled before the build stopped. For more information about locked course sections, see *Unlock Previously Scheduled Courses*.

   Note: Do not select the checkbox if you are building the master schedule for the first time or optimizing a completed master schedule.

5. Click **Execute**. The engine starts to run, and the PowerSchool Scheduler page appears. See *Understand the PowerSchool Scheduler Page*.
6. Click **(Q)** next to Build on the PowerScheduler menu to view the results of the build. The Build Master Schedule Queue page appears.

   Note: Each time you run a build, a new result appears on the Build Master Schedule Queue page.

7. Use the following table to enter information in the fields:

Field	Description
Build Type	The function performed (either Build or Optimize) appears.
Started	An indication of whether the function started (either True or False) appears.
Success	An indication of whether the function was successful (either True or False) appears.
Completed	For events where the Success is "True," the date and time at which the function completed appears. The date and time is according to the server's settings.
Results Log	Click **View** to see the results of the build. For more information, see *Build Results Log*.

Results	Click **Import** to import the results of the build from PowerScheduler Engine into PowerSchool. For more information, see *Import the Master Schedule*. **Note:** The Import link does not appear if only validation was performed.
Build Log	Click **View** to see the build log. For more information, see *Build Log*.
Comment	Enter a comment for the build, such as **First Attempt**.
Delete	Select the **Delete** checkbox to clear the build information from the queue.

8. Click **Submit** to save your changes if you entered a comment or selected the **Delete** checkbox. The Build Master Schedule Queue page refreshes.

Understand the PowerSchool Scheduler Page

After you click **Execute** on the Build Schedule page, PowerSchool prepares the information and notifies the scheduling engine on your computer that it is ready to begin the build process. The engine downloads the files necessary for the build and begins to build the schedule.

Note: With Internet Explorer, you can add a File Helper for the PowerScheduler engine application so that you're not prompted to save the engine each time you build. However, if you then work outside the network on which your PowerSchool server resides, you must change the IP address for the engine by modifying the Preferences in the engine application.

It is normal for the engine to immediately quit. The first build attempts cause the engine to do more validation. To proceed, you must eliminate all validation errors. For more information, see *Build Results Log*.

Once all of the engine validations are eliminated, the engine begins scheduling each course in the course catalog in the order defined in the course rank. The build process can take a long time. You may want to monitor the system's progress to troubleshoot if the build stops.

For each course, the system displays the following:

- Course number
- Course name
- Number of sections
- Number of courses that have been successfully scheduled
- Percentage of courses that have been successfully scheduled

The PowerSchool Scheduler page contains the following buttons:

- **More Information:** Select this option to view additional information about the course the engine is scheduling. Click **Faster Scheduling** to viewing less information so that the engine runs faster.
- **Stop:** Click this button to stop the build. Then, click **Yes** when asked if you are sure you want to stop scheduling. The system saves the schedule it created before you click **Stop** but does not schedule the course it is currently reviewing. For example, you start the build process on Friday afternoon but want to stop the build before you leave for the weekend. On Monday, restart the build where the system left off on Friday afternoon. For more information, see *Restart the Build*.
- **Skip:** Click this button to force the system to move on to schedule the next course. You should wait until at least 10% of the combinations are tried before skipping the course. Then, click **Yes** when asked if you are sure you want to skip this course. You may want to click **Skip** if the system has tested one million of more than two million combinations for a course and is beginning to slow while attempting the final million combinations. The system then schedules the course in the best combination it has already attempted.

While the engine runs, you may notice that it sometimes slows down. This is because with thousands of scheduling possibilities, the engine must cycle through them to produce the most optimal schedule possible while taking into account student requests, courses, and the constraints upon them. The engine must sort through more and more information as it proceeds with the building or loading process. For example, when the process first begins, it is easy to find a section for a student's request; however, as more sections fill up and fewer sections are available, the engine must work through a student's schedule to attempt to fulfill all course requests. Thus, you may notice periodic slow points as the engine proceeds.

When the System Stops the Build

PowerScheduler may stop the build process for one of several reasons, including the following:

- The engine has encountered validation errors. View the build results log.

- The system has encountered a course for which it cannot schedule all of its sections due to constraints that cannot be respected, data entry mistakes, or some other problem. View the build log.
- The build process is complete.

If the system stops immediately, the PowerSchool Scheduler page displays the following message: "No longer listening for incoming connections." This means that your data has uncorrected validation errors. Use the build log to correct these errors. For more information, see *Build Log*.

Build Results Log

To see the results of the build or if the engine stops immediately after starting, check the build results log. This log displays any new validation errors the engine discovered.

How to View the Build Results Log

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **(Q)** next to Build from the PowerScheduler menu. The Build Master Schedule Queue page appears.
3. Click **View** in the Results Log column of the appropriate build. The "Results Log for [school name]" page appears.

If the build stops because of validation errors, the results log displays details about these errors. There are three types of errors:

- Info: These messages are informational, such as "Course [x]: Rescheduled [x] students out of [x] (leaving [x] unscheduled)." These do not prevent a successful build.
- Warning: These are "red flag" messages, such as "The teacher's preferred room is not suitable for the course the teacher is teaching." These do not prevent a successful build.
- Error: These messages are validation errors that must be corrected in order for the engine to run, such as "Invalid valid term found in the Course file (does not match the term length)." These do prevent a successful build.

For more information about validation messages, see *Build Validation*.

Build Log

The build log displays the possible reasons the engine stopped the build while scheduling a particular course. It also displays information about course attributes, teachers, and rooms.

How to View the Build Log

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **(Q)** next to Build from the PowerScheduler menu. The Build Master Schedule Queue page appears.
3. Click **View** in the Build Log column of the appropriate build. The Build Log page appears.

How to Interpret the Build Log

If PowerScheduler completes the build, the build log displays a quick summary of the build. If the build stops because of a problem scheduling a course, the build log displays details about the course for which it stopped the build. Determine how to resolve the issue based on the following information the system lists for the course:

- Summary of the course parameters, such as whether facilities are needed
- Rooms in which the system already scheduled the course
- Names of teachers assigned to teach the course and their parameters, such as max-in-a-row
- Availability of the required facilities and rooms
- List of possible reasons for stopping

Once you have this information, make adjustments to eliminate or work around the problem. The system will not schedule any additional courses until you correct the issues.

Import the Master Schedule

Each time you build a schedule, you must import the results of that build unless you want to rebuild from scratch. Importing the master schedule flags the sections as locked. If you rebuild from this point forward, you must select the "Use locked master records?" option when building. For more information about locked course sections, see *Unlock Previously Scheduled Courses*.

If the engine stops the build before all courses have been scheduled, you can import the master schedule to view the schedule information in PowerSchool.

How to Import the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **(Q)** next to Build from the PowerScheduler menu. The Build Master Schedule Queue page appears.

   Note: Each time you run a build, a new result appears on the Build Master Schedule Queue page.

3. Click **Import**. The Import Schedule page appears.
4. Use the following table to enter information in the fields:

Field	Description
Master Schedule?	Select this option to import the master schedule without student schedules.
Master Schedule with Student Schedules?	Select this option to import the master schedule with student schedules.

5. Click **Submit**. The Import Schedule page appears.

Review Course Rank

Before you restart the build, you may need to rebuild or update your course rank if you made significant changes to a course or to student course requests.

PowerScheduler uses the course rank to determine the order in which it schedules each course. If you make changes to a course or student course requests, those changes may affect when the system should schedule the course during the build process.

Update the course rank if you add a new course to the course catalog. When you update the rank, the system fits the new course into the rank without moving or recalculating the rank of all the other courses. Rebuild the course rank for all courses if you add or drop sections from a course. The system deletes the previous course rank file and recalculates the rank for every course. For more information, see *Build Course Rank*.

If you rebuild the rank, do not lock previously scheduled courses when you build the schedule again. Rebuilding the rank places all courses, including those that were scheduled during the last build, in a new scheduling order. To allow the system to create the most successful schedule with the new rank order, build the schedule again by deselecting the "Use locked master records?" checkbox on the Build Master Schedule (Step 2) page.

Restart the Build

If you made significant changes to a course or student course requests, review your course rank before restarting the build. For more information, see *Review Course Rank*. After you solve all issues with the course, click **Build** on the Scheduling page to build the schedule again.

When you restart the build, you can do one of the following:

- Build the schedule again from scratch, which overwrites any courses that the system scheduled before the last build stopped. For more information, see *Restart the Build from Scratch*.
- Restart the build and lock all or specific courses the system successfully scheduled during the previous build. The system reschedules only courses you do not lock. To unlock sections of courses, see *Unlock Previously Scheduled Courses*.

After completing one of the above steps, analyze the build to determine if you need to adjust it. For more information, see *Analyze the Built Master Schedule*.

Restart the Build From Scratch

You may want to rebuild the schedule from scratch if either of the following are true:

- Adjustments you made to the course impact courses that were successfully scheduled during the previous build before it stopped.
- You rebuilt the entire course rank file.

For example, if you corrected a teacher conflict by defining a Teacher Part-Time constraint, the correction is likely to affect any other courses that the teacher was previously scheduled to instruct. Therefore, PowerScheduler must reschedule those courses, too.

Unlock Previously Scheduled Courses

When you rebuild the schedule, PowerScheduler automatically selects the Locked Section checkbox on the Edit Section page to lock sections that were successfully scheduled in the previous build. The purpose of locking sections is to save time when rebuilding the master schedule.

Unlock all sections for a course when you want to rebuild that course in the master schedule. The sections are locked as the build runs successfully. If the build partially finishes and then you later rebuild, the system starts where it left off. To have the system rebuild sections of a certain course and then jump to where it left off, you must unlock the sections of the course and select the Use Locked Master Records checkbox when rebuilding. For example, unlock sections of a Biology course. When rebuilding, select the Use Locked Master Records checkbox. The system starts rebuilding with Biology and then skips to where it left off in the previous build.

If you do not select the Use Locked Master Records checkbox when rebuilding the master schedule, the system rebuilds all sections, locked or not. For more information, see *Build the Master Schedule*.

How to Unlock an Individual Section

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Sections** from the PowerScheduler menu. The Sections page appears.
3. Choose the course from the courses menu for the section you want to unlock. The course information page appears.
4. Click the number of the section you want to unlock in the Section # column. The Edit Section page appears.
5. Deselect the **Locked Section** checkbox.
6. Click **Submit**. The course information page appears.

How to Unlock More Than One Section

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Update Selections**. The Update Selections page appears.
4. Choose **ScheduleSections** from the Current Table pop-up menu.
5. Choose **Course_Number** from the pop-up menu under Search ScheduleSections.
6. Enter the numbers of the courses you want to select, separated by commas, in the blank field in that row.
7. Click **Search all [number] records in this school**. The Update Selections page displays the new number of records.
8. Click **Modify Records**. The Modify Records page appears.
9. Choose **LockedSection** from the pop-up menu.
10. Ensure that the next pop-up menu displays **=** and that the following field is blank.

11. Click **Modify Selected Records**. The Update Selections page appears.

Schedule Sections

A section is an occurrence of a course. Each course can have several sections that meet in different rooms at different times and are taught by different teachers. Using the Sections page, you can view, add, edit, and delete sections for a selected course.

Note: The Sections page can be accessed using the **Sections** link under Schedule or the **Courses** link under Resources.

How to Add a Section on the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Sections** from the PowerScheduler menu. The Sections page appears.
3. Choose the course for the section you want to edit from the courses menu.
4. Click the **Sections** tab. The Sections page for the selected course appears.

   Note: Click the number in the Size column to view the class roster for the section.

5. Click **New**. The Edit Section page appears.
6. Use the following table to enter information in the fields:

Field	Description
Course Name	The name of the selected course appears.
Course Number	The number of the selected course appears.
Term	Choose the term in which the section is offered from the pop-up menu.
Schedule	Select the checkboxes for the periods for the appropriate days on which this section is taught. **Note:** This creates the schedule expression that appears next to the section on several pages.

Teacher	Choose a teacher from the pop-up menu.
Room	Enter the room name or number in which this section is taught.
Section Number	Enter a unique section number for this section. Select the **Locked Section** checkbox if the section should not be rescheduled during the next build.
Close Section at Max	Select the checkbox to not accept more enrollments than the maximum number of enrolled students.
Section Type	Choose the type of section, such as Bilingual, from the pop-up menu (optional).
Grade Level	Enter the grade level of this section.
Current Enrollment	The current enrollment of students in this section appears.
Maximum Enrollment	Enter the maximum number of students that can enroll in this section.
Team	Choose the team associated with this section from the pop-up menu.
House	Click **Associate** to select a team to which this section belongs.
Where Taught	Enter the school ID if the section is taught at a different school.
Dependent Sections	Enter any dependent sections for this section. Separate multiple sections with commas.
Scheduling Program Restrictions	Choose one of the following options: • **Include** to only include students of specified special programs in being scheduled into specified sections.

	• **Exclude** to exclude students of specified special programs from being scheduled into specified sections. If the **Include** option was selected, specify which special programs to include by doing one of the following: • Select the **Select All Programs** checkbox to select all programs. • Select the individual checkbox of each program. The **Evaluated as of [Date]** defaults to date entered in **Evaluate Programs as of this date** field. See *How to Define Program Balancing*.
Exclude From Attendance	Select the checkbox if you do not want to include this section in the student ADM/ADA counts.
Grade Scale	Choose the grade scale from the pop-up menu.
Maximum Load Status	Use the pop-up menu to indicate whether the section should be exempt from counting towards a teacher's maximum student load: • **Exempt**: Students enrolled in this section do not count towards a teacher's maximum student load. • **Lab**: Includes the students enrolled in this section in the calculated average of the number of students scheduled into all lab sections assigned to a teacher. This average is then applied to the teacher's maximum student load. • **Non-Exempt:** Students enrolled in this section count towards a teacher's maximum student load.
Exclude from GPA?	Select the option to either include or exclude the grade from the GPA calculation.
Exclude from Class Rank?	Select the option to either include or exclude the grade from the class rank calculation.

Exclude from Honor Roll?	Select the option to either include or exclude the grade from the honor roll calculation.

7. Click **Submit**. The Sections page for the selected course appears.

How to Edit a Section on the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Sections** from the PowerScheduler menu. The Sections page appears.
3. Choose the course for the section you want to edit from the courses menu.
4. Click **Sections**. The Sections page for the selected course appears.
5. Use the following table to filter information:

   Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	**Description**
Filter	To narrow the list: 1. Enter search criteria in the **Search** field. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **Expression** • **Max** • **Students** • **Room** • **Section #** • **Section Type** • **Teacher** • **Term** 3. From the second pop-up menu, choose the appropriate comparator: • c**ontains** • **contains all**

<table>
<tr><td></td><td>

contains any
does not contain
is empty
starts with
starts with any

4. Enter search criteria in the search field.

Note: Use a comma-separated list for multiple values. If contains is selected, only one value may be entered. If is empty is selected, no value may be entered.

5. Click Apply. The page refreshes and display filtered results.

Note: The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results.

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

To add another filter:

1. Click +.
2. Repeat Step 1 through Step 5.

Note: The + appears shaded if all filters have been added.

To delete a filter:

1. Click - next to the filter.
</td></tr>
</table>

Note: Click the number in the **Students** column to view the class roster for the section.

6. Click the number in the **Section #** column for the section you want to edit. The Edit Section page appears.
7. Enter information as needed. For field descriptions, see *How to Add a Section*.
8. Click **Submit**. The Sections page for the selected course appears.

How to Delete a Section From the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Schedule, choose **Sections** from the PowerScheduler menu. The Sections page appears.
3. Choose the course for the section you want to edit from the courses menu.
4. Click **Sections**. The Sections page for the selected course appears.

   Note: Click the number in the Size column to view the class roster for the section.

5. Click the number in the Section # column for the section you want to edit. The Edit Section page appears.
6. Click **Delete**. The Delete Section page appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The Sections page for the selected course appears.

How to Add a Section from the Courses Page

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
   - Choose **Sections** from the pop-up menu.
   - Click the **Sections** tab.

   The Sections page for the selected course appears.

5. Click **New**. The Edit Teacher Assignment page appears.
6. Enter information as needed. For field descriptions, see *How to Add a Section*.
7. Click **Submit**. The Sections page for the selected course appears.

How to Edit a Section from the Courses Page

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
   - Choose **Sections** from the pop-up menu.
   - Click the **Sections** tab.

   The Sections page for the selected course appears.

5. Click the number in the Section # column for the section you want to edit. The Edit Section page appears.
6. Edit information as needed. For field descriptions, see *How to Add a Section*.
7. Click **Submit**. The Sections page for the selected course appears.

How to Delete a Section from the Courses Page

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The Courses page appears.
3. Click the name of the course you want to work with from the courses menu.
4. Do one of the following:
   - Choose **Sections** from the pop-up menu.
   - Click the **Sections** tab.

   The Sections page for the selected course appears.

5. Click the number in the Section # column for the section you want to edit. The Edit Section page appears.
6. Click **Delete**. The Delete Section page appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The Sections page for the selected course appears.

Master Schedule

The master schedule displays the schedule for all teachers in your school.

How to View the Master Schedule

View the master schedule for all teachers for all periods. The first time you display the master schedule after creating or modifying it, the Master Schedule Preferences page appears. For more information, see *How to Modify Master Schedule Preferences*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Master Schedule** from the PowerScheduler menu. Depending on your preferences, classes for each teacher and the number of students in each class appear on the Master Schedule page.
3. Do one of the following (optional):

- Click a course number to edit the information for that section of the selected course. The Edit Section page appears.

  Note: For more information about editing the section, see *Schedule Sections*. If you do not want to edit the section, click your Web browser's **Back** button to display the Master Schedule page.

- Click a number for one of the classes to view a list of students in that class. The Class Roster page displays the students for the class.
- Do one of the following (optional):
  - Click **Make this the current selection of students** to select the students in the class as the only group you want to work with. The Student Scheduling Functions page appears, including the number of selected students.
  - Click **Add these students to the current selection of students** to add this group to a previously selected group. The Student Scheduling Functions page appears, including the number of selected students.

How to Modify Master Schedule Preferences

The first time you display the master schedule after creating or modifying it, the Master Schedule Preferences page appears. Use this page to filter information that appears on the master schedule page.

The master schedule preferences are associated with each user account. Therefore, your preferences will appear when you sign in to any computer with your username and password.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Master Schedule** from the PowerScheduler menu. The Master Schedule Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Periods	Select the checkboxes to indicate which periods to display on the master schedule. To display all periods, select the **All Periods** checkbox.

Days	Select the checkboxes to indicate which days to display on the master schedule. To display all days, select the **All Days** checkbox.
Credit Type	Enter the credit type to indicate which credit type to display on the master schedule, such as **MATH**. To display all credit types, do not enter anything in the field.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

4. Click **Submit**. The master schedule appears.

   Unless any changes are made to your master schedule, the Master Schedule page appears according to your set preferences. To change your preferences, click **Show Preferences** at the bottom of the Master Schedule page.

Analyze the Built Master Schedule

After the system completes the build, evaluate the master schedule to see if you need to either make changes and rebuild the schedule or manually adjust it.

To analyze the completed master schedule:

- Print the master schedule.
- Print post-scheduling reports. For more information, see *Build the Master Schedule Reports*.

To evaluate the master schedule:

- Use the student numbers to evaluate how the system balanced students among sections.
- Evaluate how and when a room is used.
- Be sure teachers are not over- or under-scheduled. Teachers should not be over-scheduled unless you entered an excess number of teacher assignments.

Master Schedule Checklist

Use the following checklist to help you determine that the master schedule is complete and ready to optimize, load, or print. For more information, see *Optimize the Completed Master Schedule*, *Load Students*, and *Print Schedules and Rosters*.

- Are all of the courses in the course catalog defined to be included in the master schedule?
- Do all of the courses in the master schedule contain the correct number of sections?
- Did the system respect all of the constraints you defined?
- Did the system schedule all of the courses in rooms with any required facilities?

Optimize the Completed Master Schedule

When you determine that your master schedule is complete, PowerScheduler can perform a final optimization. Although it is not required, you should optimize the master schedule. For more information, see *Optimize the Master Schedule*.

Optimize your schedule before or after you make any manual adjustments. If you want to optimize your master schedule after you make manual adjustments and you want to keep these courses where you manually scheduled them, enter very high rank numbers for the adjusted courses in the course rank. You can then define that the system only optimizes courses with a lower rank number. If you did not keep track of the courses you adjusted, do not optimize.

Optimizing your schedule can only make it better. To safeguard the original completed master schedule before you optimize, duplicate the scenario. For more information, see *Duplicate the Scenario*.

After optimizing the master schedule, you can finalize it. For more information, see *Finalize the Master Schedule*.

Duplicate the Scenario

Make a copy of the original completed master schedule before you optimize it.

How to Duplicate the Scenario

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Functions** from the PowerScheduler menu. The Scheduling Functions page appears.
3. Click **Duplicate Scenarios**. The Duplicate Scenarios page appears.
4. Use the following table to enter information in the fields:

Field	Description

Source Scenario	Choose the name of the scenario you want to duplicate from the pop-up menu.
New Scenario Name	Enter a name for the new scenario.
New Scenario Description	Enter a description of the new scenario.
Master Schedule	Select the checkbox to copy the master schedule into the new scenario.
Student Schedules	Select the checkbox to copy the student schedules into the new scenario.
Teacher Assignments	Select the checkbox to copy the teacher assignments into the new scenario.
Constraints	Select the checkbox to copy the constraints into the new scenario.
Course Relationships	Select the checkbox to copy the course relationships into the new scenario.

Note: Be sure to select all of the checkboxes in the "Select items to copy" section to duplicate your current scenario in its entirety.

5. Click **Submit**. The Changes Recorded page appears.

Optimize the Master Schedule

Optimize your master schedule to meet as many student course requests as possible within the given parameters.

How to Optimize the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Build** from the PowerScheduler menu. The Build Schedule page appears.

3. Select the **Optimize master schedule** option.
4. Use the following table to enter information in the fields:

Field	Description
Time Allowed for Optimizations	Enter the number of hours in the first field and the number of minutes in the next field that you want the system to spend optimizing your master schedule. **Note:** Because PowerSchool restarts nightly, do not enter a number higher than 12 in the Hours field.
Skip courses with rank above	Enter the course rank number of the course at which you want the system to stop optimizing. For example, you do not need to optimize course rank numbers 800-910 if these courses are ranked as such because they are already successfully scheduled. Enter 800 in the Max Rank field to have the system optimize the courses with a course rank of 1-799.

5. Click **Execute**. The engine starts to run. For more information, see *Understand the PowerSchool Scheduler Page*.

Finalize the Master Schedule

Once you built and possibly optimized the master schedule, you need to import the information from the scheduling engine back to PowerSchool. For more information, see *Import the Master Schedule*.

Note: For more information about this page, see *Understand the PowerSchool Scheduler Page*.

Load Constraints

Load constraints restrict the way PowerScheduler loads students into courses in the master schedule.

PowerSchool includes six types of definable load constraints. Each constrain student schedules in a specific way. For example, use a Student Preference constraint to force a student to be scheduled in a particular teacher's section.

Note: Since constraints restrict student schedules, the more constraints you define, the less flexibility the system has to load students into courses and the less optimal the resulting schedule will be. It is always best to use the fewest number of constraints required to accomplish your scheduling goals.

Load constraints differ from build constraints, which are defined before building a master schedule. For information about build constraints, see *Build Constraints*.

Work with Load Constraints

After creating load constraints, you can view them by choosing **Constraints** under the Resources heading from the PowerScheduler menu. Select the constraint you created to view the constraints by type.

To view constraints that affect courses, sections, students, or teachers, choose the appropriate resource from the PowerScheduler menu. Then, view the constraints by choosing Constraints from the pop-up menu. The Constraints page displays all constraints that affect that resource, regardless of type.

Use the PowerScheduler menu to view the constraints by type or to modify or delete constraints.

How to Modify Load Constraints

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Click the name of the type of constraint you want to modify, such as **Balance Adjustment**.
4. Click the course name, student name, or teacher name in the row of the constraint you want to modify. The Edit page for that particular constraint appears.
5. Make your changes to the fields, as necessary.
6. Click **Submit**. The appropriate constraints page appears.

How to Delete Load Constraints

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Scheduling Setup, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Click the name of the type of constraint you want to delete, such as **Student Preference**.
4. Click the course name, student name, or teacher name in the row of the constraint you want to delete. The Edit page for that particular constraint appears.
5. Click **Delete**. The appropriate constraints page appears.

Load Students

When using PowerSchool to create a complete master schedule, you need to be familiar with both building and loading a master schedule.

The build process creates the master schedule by placing courses in specific rooms during certain periods and scheduling teachers to instruct those courses. The load process places students in a schedule that has been or is being created, based on their course requests. Effectively, the build creates the master schedule and the load creates the student schedules.

Although students are loaded into the schedule as it is building, this is not necessarily an optimal load. Students who are loaded into the schedule earlier have an advantage over those loaded later. Their course requests are more likely to be met. Also, while these students may be fully or close to fully scheduled, theirs may not be the best possible schedule that the system can create based on the completed master schedule.

When the students' schedules were created during the build process, the best possible schedules were chosen for them at that time; however, the build was not complete and optimized, and the system could not take into account any changes made to the schedule after they were loaded.

Note: The build function only does one pass; it does not go back to review better alternatives for courses already scheduled.

Once you have built a satisfactory master schedule, you can begin fine-tuning student schedules by running a load. While this function has no impact on the number of students enrolled in courses, it could have a positive effect on section balances. For example, it is possible that during your first load, you gain eight students in one course, five students in another, and ten in a third. Then, you can try again to help individual students get all of their course requests.

Do not load students into your master schedule until you are satisfied with it. Loading will not have any impact on the structure of the schedule, just on the placement of students within it. Also, do not make manual adjustments to student schedules and then reload students because the system will overwrite all of the changes you made.

Loading is required in most cases. You need to load if you entered alternate course requests or global substitutions, or if you chose to close course sections at a maximum number. The build process does not handle these factors, which are not considered unless you load. Also, if you are making manual adjustments to your master schedule, you need to do a load under most circumstances.

After running a load, analyze the results. For more information, see *Analyze the Results*. After analysis, proceed with one of the steps outlined in the section *Post-Load Options*.

Run a Load

Adjusting the master schedule potentially affects and causes conflicts for many students' schedules. For example, moving a course section to a different period may satisfy a number of unmet course requests, but this action can cause problems with others course requests.

As a result, whenever you change the master schedule, you need to reload students. You can also load students to see if the system can create better schedules for all students. Do this after you finish building a master schedule or if you made a number of changes to the schedule.

After running a load, import student schedules and then analyze the results. For more information, see *Analyze the Results*. After analysis, proceed with one of the steps outlined in the section *Post-Load Options*.

When performing a load, consider the following:

- Load priority is used to determine which substitutions should be made as well as which requests should go unfilled, if that is necessary. The engine always prefers to use substitutions instead of leaving a request unfilled, even if that means using a substitution on an important course instead of leaving an elective course unfilled.
- Load priorities are not a rank ordering. They are an importance rating. One request for a course with a load priority of 5 is equivalent to two requests with a 10 priority, three with a 15 priority, or four with a 20 priority. That means that, while these courses may have a priority of 5 and other courses have a priority of 10, it is just as good for the engine to leave the priority 5 unfilled as it is to leave two priority 10 courses unfilled; it is actually better for the engine to leave one priority 5 unfilled than to leave two courses with priority 9 or lower unfilled.

  For example, if a student has two 7 requests and one 5 request; while neither of the 7 requests can be filled outright, they both have substitutions; the substitutions, however, conflict with the 5 course, so the student can't get both. Therefore, it is better for the engine to miss the 5 and fill the two 7 requests with substitutions than it would be to leave the 7s unfilled and get the 5.
- To rate a course as really important, assign it a load priority of 1 or 10. For all other courses, rank according to how important they are relative to that 1 (or 10) course (even if that means using numbers like 1000). Then, as a second pass, double or quadruple their load priorities if any of those are semester or quarter courses.

How to Run a Load

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Load** from the PowerScheduler menu. The Load Student Schedules Queue page appears.
3. Use the following table to enter information in the fields:

Field	Description
Load type	Select a type of load: • **Load all students**: The system reschedules all students. Previously created student schedules or manually adjusted student schedules are deleted. • **Balance**: The system adjusts student schedules to help improve the balance of students among sections. There is no guarantee that students' schedules will not change. • **Reschedule the selected [x] students**: The system reschedules only students whose schedules have not been locked. You can select this option multiple times.
Close sections at maximum	Select the checkbox to ensure that courses close at their maximum enrollment numbers. **Note:** Do not select the checkbox the first time you do a load. The build itself runs without considering section maximums, so this will let you determine if you can get a little better load percentage. Also, not closing sections at their maximums will help you focus on students with conflicts.
Use global course substitutes	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use student course substitutes	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.

4. Click **Execute**. The engine starts to run. For more information, see *Understand the PowerSchool Scheduler Page*.

To view details about the load, click **(Q)** next to Load in the PowerScheduler menu, then click **View** in the Load Log column on the Load Student Schedules Queue page. To view errors and messages produced by the load, click **View** in the Results Log column. For more information about the Results Log, see *Load Results Log*. After successfully loading schedules, import the results of the load. For more information about importing, see *Import Student Schedules*.

Note: The Import link does not appear on the Load Student Schedules Queue page if only validation was performed. For more information about load validation, see *Load Validation*.

Post-Load Options

After completing your first load, you can do one or more of the following procedures:

1. Accept the results of the load and begin manually adjusting student schedules. Select this option only if you are certain that the master schedule will not change and that student schedules are correct. Verify student schedules to make sure the master schedule is correct. For more information about adjusting student schedules, see *Manually Adjust Student Schedules*.
2. Resolve student conflicts by using or adding alternate course requests if you did not use them in the first load. If your schedule contains alternate student course requests but you did not allow the system to use them, rerun the load and select the substitutes options. For more information about creating alternate course requests, see *How to Enter Requests in the Scheduling Area*.
3. Manually adjust student course requests to allow better scheduling. For example, if a student has a course request that is impossible to meet, change it. Repeat this process until you are satisfied with the results. For more information about adjusting alternate course requests, see *How to Enter Requests in the Scheduling Area*.
4. Select the students you want to reschedule. Then, reload student schedules.

If you select option 2, 3, or 4 above, you probably need to reload student schedules. For more information, see *Reload Students*.

In the event that the unsatisfactory load results are due to discrepancies in the master schedule, you need to rebuild or manually adjust the master schedule. For more information, see *Restart the Build*.

Lock Student Schedules

If you manually adjusted students' course requests and are satisfied with the resulting schedules, you can effectively lock those students' schedules before reloading by excluding them from the student selection before reloading. That way, only the selected students are included in the load.

Note: If one of the students in the selection has an association with another student, such as a Student Avoid constraint, the schedule of the "other" student not included in the selection may be affected by the load process.

For more information about selecting students, see *Schedule Search and Select*.

Checklist to Know Your Student Schedules are Complete

The following is a checklist you can use to be sure that your student schedules are complete:

- You built a master schedule.
- You worked on conflicts, identified patterns, and corrected problems.
- You updated your master schedule.
- You optimized your master schedule. (optional)
- You ran a load.
- You checked your balances.
- You accommodated all student course requests. (optional)
- You reloaded and made any manual adjustments.
- Your balances are satisfactory.
- Your teacher schedules are satisfactory.

Print Schedules and Rosters

Print Student Schedules

If you would like to print student and teacher schedules, you can do so either before or after you commit your master schedule. For more information, see *How to Run the Student Schedule Listing Report*.

You can also print student schedules using a report card template. For more information, see *Report Cards*.

Print Class Rosters

You can print class lists either before or after you commit your master schedule. For more information, see *How to Run the Class Roster (PDF) Report*.

Master Schedule Reports

Before building your master schedule, use the pre-build reports to determine that the scenario information is correct and view how student course requests will affect your schedule for the next school year. For example, run the Course Request Tally report if there are more requests than you originally planned for a particular course. You can then adjust the section count before building. For pre-build reports, see *Prepare to Build the Master Schedule Reports*.

You can also view reports to display which teachers are assigned to which courses and print a teacher assignments list. The teacher reports only display the names of teachers who are already assigned to courses.

After you build a master schedule, use the post-build reports to help you correct any errors in your data, such as non-scheduled course requests, non-scheduled student requests, and under-scheduled students. You can also use these reports to view your room utilization, a list of student schedules, and your new master schedule. For post-build reports, see *Build the Master Schedule Reports*.

Report Output Locale

Using the **Report Output Locale** pop-up menu, you can select a locale. The report output will then appear in the language associated with the selected locale.

Prepare to Build the Master Schedule Reports

PowerSchool includes many reports pertaining to the master schedule. The following reports are specific to the first part of the master schedule process, prepare to build the master schedule, and relate to courses, student course requests, rooms, students, and teachers. For request-related reports, see *Prepare to Build the Master Schedule Request Reports*. For teacher-related reports, see *Prepare to Build the Master Schedule Teacher Reports*. Use the Scheduling Reports page to navigate to each report.

How to Run the Conflict Matrix Export Report

The Conflict Matrix Export report displays student course request conflicts between courses. For example, you might find that 16 students have requested both AP Calculus and Anatomy/Physiology. Therefore, you would try not to schedule these two classes during the same period.

Note: This report is used primarily by schools and districts that are not building their master schedule in PowerSchool.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Conflict Matrix Export**. The Export Conflict Matrix page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the Include Only In Grades field, enter the numbers of the grade levels you want to include in this report (optional).
Output Form	Select **Tab-Delimited** to open the report in a program such as Excel or **Simple HTML** to open in a Web browser. **Note**: If SSL is enabled, you must manually assign a port to view the HTML output. For more information, see the *Load Balancer Requirements and Configuration Guide* available on PowerSource. Select the **Link each count to the conflicting students list** checkbox to display a link to the list of students who have scheduling conflicts.
Conflict Definition	Select **Count students with multiple requests for a course as a single conflict** to identify multiple requests of the same course as one conflict. With the checkbox selected, the number of student requests matches the number of conflicts. For example, if a student creates two requests for History and one for Math, the report displays this as one History-Math conflict instead of two. Deselect the checkbox to display multiple requests as multiple conflicts. Select **Count every request as a conflict with itself** to count multiple requests for a course plus the individual requests that create the conflict. This may be useful to show conflicts where a student requests a course twice. Deselect the checkbox to only

	count multiple requests and not the individual requests that create the conflict.
Identify Course By	Select the **Course numbers** option to include course numbers, the **Course names** option to include course names, or **Course numbers + names** to include both.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. **Note:** Clicking on hyperlinks within the report may display a different page in PowerSchool, which will appear in your preferred language and not in the locale you selected for the report output.

5. In the Courses Across Top section, use the following table to enter information in the fields to display information on the X axis of the report:

Field	Description
Include Courses	Select one of the following options: • **All Courses** to include all courses in your active course catalog in this report. **Note:** If you select **All Courses**, you do not have to select the checkboxes next to each course name at the bottom of the page. • **In Department** to include all courses in a specific department. Either enter the name of the department or click **Associate** to select the department. • **With Number of Sections between** to include courses with a specified number of sections. Enter the range of section numbers in the fields. • **Selected courses (below)** to include just the courses you select at the bottom of the page. Select the **Include courses with No Requests from selected students** checkbox to include courses that do not have any

	student requests. This may be useful when comparing multiple exports, as the reports will align if the checkbox is selected for both. Deselect the checkbox to include only courses with student requests.
Sort by	Select one of the following options to sort the report columns (all ascending except Number of Conflicts): • **Course Number** • **Course Name** • **Number of Sections** • **Number of Requests** • **Number of Conflicts (with the courses along the other axis)**
Include Rows for	Select any or all of the following checkboxes to add rows to the report for each: • Number of Sections • Number of Requests • Terms Offered • Total Conflicts

6. In the Courses Along Side section, use the following table to enter information in the fields to display information on the Y axis of the report:

Field	**Description**
Include Courses	Select one of the following options: • **All Courses** to include all courses in your active course catalog in this report. **Note:** If you select **All Courses**, you do not have to select the checkboxes next to each course name at the bottom of the page.

	• **In Department** to include all courses in a specific department. Either enter the name of the department or click **Associate** to select the department. • **With Number of Sections** between to include courses with a specified number of sections. Enter the range of section numbers in the fields. • **Selected courses (below)** to include just the courses you select at the bottom of the page. Select the **Include courses with No Requests from selected students** checkbox to include courses that do not have any student requests. This may be useful when comparing multiple exports, as the reports will align if the checkbox is selected for both. Deselect the checkbox to include only courses with student requests.
Sort by	Select one of the following options to sort the report columns (all ascending except Number of Conflicts): • **Course Number** • **Course Name** • **Number of Sections** • **Number of Requests** • **Number of Conflicts (with the courses along the other axis)**
Include Columns for	Select any or all of the following checkboxes to add rows to the report for each: • **Number of Sections** • **Number of Requests** • **Terms Offered** • **Total Conflicts**

7. If you chose **Selected Courses (below)** for either axis, select the checkbox next to the name of each course you want to include in this report.
8. Click **Submit**. The report runs.

How to Run the Conflicting Students List Report

The Conflicting Students List Report displays the students with primary requests for two specific courses. For example, run this report to determine if any students requested both Pre-Algebra and Algebra courses that should not be taken simultaneously, or if any students requested two courses that take place only on the same day and period. If you identify conflicts, you could move the assignments, sections, or requests before loading student schedules.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Conflicting Students List**. The Students With Request Conflict page appears.
4. Use the following table to enter information in the fields:

Field	Description
Course Number 1	Click **Associate** to select one of the courses.
Course Number 2	Click **Associate** to select the other course.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

5. Click **Submit**. The Students with Conflict page displays all students who requested both courses.

How to Run the Course List Report

The Course List report displays scheduling information for each course in your active course catalog.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Course List**. The Course List page appears.

4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The Courses page displays the following information:

Field	Description
Number	The course number.
Name	The course name.
Scheduled	Indicates whether or not the course is scheduled.
Department	The course's department.
Max	The maximum enrollment of the course.
Sections	The number of sections of the course.
PP Meeting	The number of periods per meeting.
Frequency	The number of days the course meets per cycle.
PP Cycle	The number of days per cycle.
Valid Start Periods	The periods in which periods the course is valid to start.
Sched Terms	The number of schedule terms in which the course is offered.
Terms Offered	The terms in which the course if offered.
Facilities	Any facilities associated with this course.
LP	The order in which students are scheduled in this course during the load process.

Team	Indicates if this course is scheduled by team.
Section Type	Indicates if this course is scheduled by section type.
Section to Offer	The number of sections to offer for the course.
Rank	The rank of the course that determines the order in which PowerSchool schedules courses into the master schedule.

6. To narrow the list of courses, see *How to Filter (Simple) the Course List Report* or *How to Filter (Advanced) the Course List Report*.

How to Filter (Simple) the Course List Report

1. To narrow the list of courses using simple search, use the following table to enter information in the Filter section:

   Note: If you apply a filter, those settings are retained and available each time you navigate back to this page.

   Note: Click the arrow to expand this section. Click the arrow again to collapse this section

Field	Description
Advanced	Verify this checkbox is deselected.
Search	Enter search criteria in the search field.

2. Click **Apply**. The page refreshes and display filtered results.

   Note: To remove all filter selections, click **Clear**.

How to Filter (Advanced) the Course List Report

1. To narrow the list of courses using advanced search, use the following table to enter information in the Filter section:

Note: If you apply a filter, those settings are retained and available each time you navigate back to this page.

Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	Description
Advanced	Select the checkbox.
[Column]	Choose the column by which you want to filter courses: • Number • Name • Scheduled • Department • Max • Sections • PP Meeting • Frequency • PP Cycle • Valid Start Periods • Sched Terms • Terms Offered • Facilities • LP • Team • Section Type • Section to Offer • Rank
[Comparator]	If you selected a column where a comparator is applicable, choose the appropriate comparator: • = equals • < is less than • > is greater than
[Field]	Enter search criteria in the search field.

2. To add another filter, click **+** and repeat Step 1.
3. To delete a filter, click **-** next the filter.
4. Click **Apply**. The page refreshes and display filtered results.

   Note: To remove all filter selections, click **Clear**.

How to Run the Course Relationships Report

The Course Relationships report displays any course relationships defined for courses in your course catalog.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Course Relationships**. The Course Relationships page appears.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The Course Relationships page displays the following information:

Field	**Description**
Course Number 1	The number of the first course.
Course Name 1	The name of the first course.
Course Number 2	The number of the second course.
Course Name 2	The name of the second course.
Type	The type of relationship that has been defined for these two courses: • Block: Courses that must be related to one another in the schedule. For example, you may want Pottery to be scheduled before or after Ceramics so that they can share a hot kiln. Alternatively, a medieval literature class may follow a medieval history class.

	• Concurrent: Courses that can meet at the same time, in the same place, and be taught by the same teacher. For example, a special education teacher might have a class of ten students, three of whom are taking remedial reading and the remainder of whom study remedial vocabulary and spelling. • Coreq: Two courses that are scheduled during the same term of a student's schedule. • Postreq: A course that must be in a student's schedule in a term after the related course. • Prereq: A course that must be in a student's schedule in a term before the related course. For example, Course A is a prerequisite of Course B. When the system schedules a student for these courses, it ensures that Course A is scheduled into a term before when Course B is in the student's schedule.
Code	If the two courses share a block relationship type, this field describes the type of block relationship, such as Term or Simultaneous.

How to Run the Room List Report

The Room List report provides scheduling information for all of the rooms available in the school.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Room List**.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The Rooms page displays the following information:

Field	**Description**

Number	The room number.
Description	A description of the room.
Max	The maximum enrollment of the room.
Sched	Displays the word True if the room is included in the scheduling process or False if it is not.
Department	The department to which the room belongs.
Dept. Use Only	Displays the word True if the room can only hold courses from its own department or False if it can hold courses from any department.
Facilities	The facilities associated with the room.
Fac. Use Only	Displays the word True if the room can only hold courses requiring a facility or False if it can hold courses that do not require a facility.
Always Free	Displays the word True if the room has no limit to the number of courses it can hold or False if it can only hold one course per period.
Building	The building associated with the room.
House	The house associated with the room.

How to Run the Student List Report

The Student List report provides scheduling preference information for all of the students who will attend your school next year.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student List**.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	Description
Number	The student's number.
Name	The student's name.
Grade	The student's grade level.
Gender	The student's gender.
Next Grade	The grade level the student will be in next year.
Priority	The student's scheduling priority.
YOG	The student's year of graduation.

Locked	Displays the word True if the student's schedule has been locked or False if it has not been locked.
Building	The student's building.
House	The student's house.
Team	The student's team.

Prepare to Build the Master Schedule Teacher Reports

PowerSchool includes many reports pertaining to the master schedule. The following reports are specific to the first part of the master schedule process, prepare to build the master schedule, and relate to teachers. For other reports, see *Prepare to Build the Master Schedule Reports*. Use the Scheduling Reports page to navigate to each report.

How to Run the Teacher Assignments by Course Report

The Teacher Assignments by Course report lists the courses assigned to each teacher in your school.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Teacher Assignments By Course**.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The Teacher Assignments By Course page displays the following information:

Field	Description
Course #	The course number.

Course Name	The course name.
#	The numbered list of teachers.
Teacher Name	The teacher's name.
# Sections	The number of sections assigned to the teacher.
Term	The terms for which an assignment has been made. If this field is blank, the system will determine the term based on course preference information.

How to Run the Teacher Assignments by Teacher Report

The Teacher Assignments by Teacher report lists the courses assigned to each teacher in your school.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Teacher Assignments By Teacher**.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The Teacher Assignments By Teacher page displays the following information:

Field	**Description**
Teacher Name	The teacher's name.
#	The numbered list of courses for each teacher.
Course Name	The course name.

Course #	The course number.
# Sections	The number of sections assigned to the teacher.
Term	The terms for which an assignment has been made. If this field is blank, the system determines the term based on course preference information.

How to Run the Teacher List Report

The Teacher List report lists the scheduling preferences for all of the teachers in your school.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Teacher List**.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The Teachers page displays the following information:

Field	Description
Teacher	The teacher's name.
Department	The teacher's department.
Room	The teacher's preferred room number.
Consecutive	The maximum number of consecutive periods the teacher can instruct.

Always Free	Displays the word True if the teacher can be scheduled to teach more than one course during the same period or False if the teacher can teach only one course per period.
Building	The teacher's building.
House	The teacher's house.
Team	The teacher's team.

Prepare to Build the Master Schedule Request Reports

The following reports relate to student course requests. For other reports that are useful before building a master schedule, see *Prepare to Build the Master Schedule Reports*.

How to Run the Course Request Tally Report

The Course Request Tally report lists the number of primary and alternate student course requests by course. Use this report to determine how many sections of a course you need.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Course Request Tally**. The Course Request Tally page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).

Exclude Alternates	Select **Yes** from the pop-up menu to exclude alternate requests.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The Course Request Tally page displays the following information:

Field	**Description**
Course	The course number.
Course Name	The course name.
Primary	The number of primary student course requests for the course. Click a number to view the list of students who requested a particular course.
Alternate	The number of alternate student course requests for the course. Click a number to view the list of students who requested a particular course.
Elective Alt	The number of elective alternate student course requests for the course. Click a number to view the list of students who requested a particular course.
Total	The total number of requests for the course. Click a number to view the list of students who requested a particular course.

Note: Click any column heading to sort the list.

How to Run the Requests by Course Report

The Requests by Course report lists the names of the students who requested each of the courses in your course catalog.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Requests by Course**. The Requests By Course page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The Requests By Course page displays the following information:

Field	Description
Course #	The course number.
Course Name	The course name.
#	The numbered list of students for each course.
Student Name	The names of the students who requested each course.

How to Run the Requests by Student Report

The Requests by Student report lists the names of the courses each student requested.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Requests by Student**. The Requests By Student page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The Requests By Student page displays the following information:

Field	Description
Student #	The student number.
Student Name	The student's name.
#	The numbered list of courses requested by each student.
Course #	The course number for the course requested by each student.
Course Name	The name of the course requested by each student.

How to Run the Student Request Tally Report

The Student Request Tally report displays the number of primary and alternate student course requests made by each student.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student Request Tally**. The Student Request Tally page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The Student Request Tally page displays the following information:

Field	Description
#	The numbered list of students.
Student	The student's name.
% Scheduled	The percentage of the student's course requests that were fulfilled.
Primary	The number of primary course requests made by the student.
Credits	The number of credit hours for primary course requests.

Alternate	The number of alternate course requests made by the student.
Credits	The number of credit hours for alternate course requests.
Total	The total number of course requests made by the student.
Credits	The number of credit hours for all course requests.

Build the Master Schedule Reports

PowerSchool includes a number of reports that help you evaluate a completed master schedule. Use these reports to determine whether maximum enrollment parameters need to be increased, the teachers are correctly scheduled, and the system scheduled courses in rooms and their facilities at the correct times.

The following reports are specific to the second part of the master schedule process, build the master schedule, and relate to the master schedule, student course requests, rooms, schedules, and students.

Reports

- *Alternate Request Report*
- *Individual Student Conflict Matrix Report*
- *Master Schedule Report*
- *Master Schedule (PDF) Report*
- *Master Schedule List Report*
- *Non-Scheduled Course Requests Report*
- *Non-Scheduled Student Requests Report*
- *Non-scheduled Student Requests for Scheduled Courses Report*
- *Percent Schedule By Students Report*
- *Room Schedule Report*
- *Room Utilization Report*
- *Schedule Periods by Grade Report*
- *Schedule Course Enrollment Report*
- *Schedule Results by Grade Report*
- *Student Program Balancing*
- *Student Schedule List Report*
- *Student Schedule Report*
- *Teacher Maximum Load Report*

- *Under-Scheduled Students Report*
- *Unscheduled Rooms Report*
- *Unscheduled Students Report*
- *Unscheduled Teachers Report*

How to Run the Alternate Request Report

Use the Alternate Request report to list the number of course requests made by a student and whether or not the student was scheduled in his or her requested course. The report separates the requests by course and alternate course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Alternate Request Report**.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The Requests By Student page displays the following information:

Field	Description
Student Name	The name of the student.
Requests	The names and numbers of the requested courses.

Scheduled Alternates	The names and numbers of the scheduled alternate courses.
Scheduled	An X next to a course indicates that the student was scheduled in that course.

How to Run the Master Schedule Report

Use the Master Schedule report to evaluate the schedule the system built. View the master schedule for all teachers for all periods. The first time you display the master schedule after creating or modifying it, the Master Schedule Preferences page appears. For more information, see *How to Modify Master Schedule Preferences*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Master Schedule**. The Master Schedule page appears.

   Depending on your preferences, the report may display the teacher's name, the selected day, and the following information for each period:

   - Name of the course assigned to a teacher
   - Course number.Section number (click to view that section's Edit Section page)
   - Number of students scheduled for this section (click to view the class roster)
   - Maximum enrollment of this section
   - Room number
   - Expression, which is the combination of periods and days
   - Term

How to Run the Master Schedule (PDF) Report

Use the Master Schedule PDF report to generate a PDF of the master schedule. View the master schedule for all teachers for all periods. The first time you display the master schedule after creating or modifying it, the Master Schedule Preferences page appears. For more information, see *How to Modify Master Schedule Preferences*.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Master Schedule (PDF)**. The Master Schedule PDF page appears.
4. Use the following table to enter information in the Master Schedule Options fields:

Field	Description
Periods	Select the checkboxes to indicate which periods to display on the master schedule. To display all periods, select the **All Periods** checkbox.
Days	Select the checkboxes to indicate which days to display on the master schedule. To display all days, select the **All Days** checkbox.
Credit Type	Enter the credit type to indicate which credit type to display on the master schedule, such as **MATH**. To display all credit types, do not enter anything in the field.
Rooms	Select the rooms to display on the master schedule. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. Select **All Rooms** to display all rooms.
Teachers	Select the teachers to display on the master schedule. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. Select **All Teachers** to display all teachers.
Sort By	Select a sort order option for the master schedule: • **Teacher** • **Credit Type** • **Department** • **Room**
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

5. Use the following table to enter information in the Printing Options fields:

Field	Description
Period/Day orientation	Select an option to determine which axis should display periods and which axis should display days: • **Periods across the top** • **Days across the top**
Heading Font	Choose the heading font from the pop-up menu.
Size, line height, style	Enter the heading font size and line height in points. One point equals 1/72 of an inch. Select the formatting checkboxes you want to use. For example, select the **Bold** checkbox to bold the heading.
Print Heading On	Choose the page on which to print the heading from the pop-up menu.
Column Title Font	Choose the column title font from the pop-up menu.
Size, line height, style	Enter the column title font size and line height in points. One point equals 1/72 of an inch. Select the formatting checkboxes you want to use. For example, select the **Bold** checkbox to bold the column title.
Print Column Titles On	Choose from the pop-up menu the page on which to print the column titles: • **All pages** • **First page** • **Do not print column titles**
Body Font	Choose from the pop-up menu the font for the body of the report.

Size, line height, style	Enter the body font size and line height in points. One point equals 1/72 of an inch. Select the formatting checkboxes you want to use. For example, select the **Bold** checkbox to bold the body.
Cell padding (points)	Enter the width of each cell and the amount of space from all sides of the cells to the text in points. One point equals 1/72 of an inch.
Page size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins (inches)	Enter the size of the margins in inches.
Orientation, Scale	Choose the page layout from the pop-up menu. **Portrait** is a vertical page; **Landscape** is a horizontal page. Scale is the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP:** Execute immediately. • **At Night:** Execute during the next evening. • **On Weekend:** Execute during the next weekend.

	• **On Specific Date/Time:** Execute on the date and time specified in the following fields.

6. Click **Submit**. The report queue appears.
7. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application.

How to Run the Master Schedule List Report

Use this report to display the master schedule with filters. For example, filter the report to show the master schedule for a certain credit type, room, and teacher.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Master Schedule List**. The Master Schedule List page appears.

   Note: The first time you display the master schedule after creating or modifying it, the Master Schedule Preferences page appears. Use this page to filter information that appears on the master schedule page. To change your preferences after running the report, click **Show Preferences** at the bottom of the master Schedule List page. For more information, see *How to Modify Master Schedule Preferences*.

4. Use the following table to filter information:

   Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	Description
Filter	1. Enter search criteria in the **Search** field. 2. To filter by columns: a. Click **+**.

	b. From the first pop-up menu, choose one of the following: • **Course Name** • **Expression** • **Max** • **Number.Section** • **Section #** • **Room** • **Section Type** • **Students** • **Teacher Department** • **Teacher Name** • **Team** • **Term** c. From the second pop-up menu, choose the appropriate comparator: • **contains** • **contains all** • **contains any** • **does not contain** • **is empty** • **starts with** • **starts with any** d. Enter search criteria in the search field. **Note:** Use a comma-separated list for multiple values. If **contains** is selected, only one value may be entered. If **is empty** is selected, no value may be entered. e. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. **Note:** Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

	3. To add another filter, click **+** and repeat Step 1. **Note:** The **+** appears shaded if all filters have been added. 4. To delete a filter, click **-** next the filter. 5. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

Note: Click the number in the **Students** column to view the class roster for the section.

5. Click the number in the **Section #** column for the section you want to edit. The Edit Section page appears.
6. Enter information as needed. For field descriptions, see *How to Add a Section*.
7. Click **Submit**. The Sections page for the selected course appears.

   The master schedule list displays the course and section numbers, course name, schedule expression, term, teacher name, teacher department, room number, number of students enrolled, and maximum enrollment for each course section.

How to Run the Non-Scheduled Course Requests Report

Use the Non-Scheduled Course Requests report to view for each course the students whose course requests could not be honored during the scheduling process. This information can help you determine if you need to ease course maximum restrictions, add more course sections, or update a student's course requests.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.

   Note: To exclude alternate requests, click **Exclude Alternates** below the report name.

3. Click **Non-scheduled Course Requests**. The Non-Scheduled Course Requests page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Exclude Alternates	Select **Yes** from the pop-up menu to exclude alternate requests.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	Description
Course Number	The course number. **Note:** Alternate course requests are noted with (Alt).
Course Name	The course name. **Note:** Alternate course requests are noted with (Alt).
Student Number	The number of the requesting student that was not scheduled in this course.
Student Name	The name of the requesting student that was not scheduled in this course.

How to Run the Non-Scheduled Student Requests Report

Use the Non-Scheduled Student Requests report to determine which course requests have not been satisfied on a student-by-student basis. The information can help you decide if you need to ease course maximum restrictions or update a student's course requests.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.

   Note: To exclude alternate requests, click **Exclude Alternates** below the report name.

3. Click **Non-scheduled Student Requests**. The Non-Scheduled Student Requests page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Exclude Alternates	Select **Yes** from the pop-up menu to exclude alternate requests.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	Description
Student Number	The number of the requesting student that was not scheduled in this course.

Student Name	The name of the requesting student that was not scheduled in this course.
Course Number	The course number. **Note:** Alternate course requests are noted with (Alt)
Course Name	The course name. **Note:** Alternate course requests are noted with (Alt).

How to Run the Non-Scheduled Student Requests for Scheduled Courses Report

Use the Non-Scheduled Student Requests for Scheduled Courses report to determine which requests for scheduled courses have not been satisfied on a student-by-student basis.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.

   Note: To exclude alternate requests, click **Exclude Alternates** below the report name.

3. Click **Non-scheduled Student Requests for Scheduled Courses**. The Non-Scheduled Student Requests for Scheduled Courses page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students .In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).

Exclude Alternates	Select **Yes** from the pop-up menu to exclude alternate requests.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	**Description**
Student Number	The number of the requesting student that was not scheduled in this course.
Student Name	The name of the requesting student that was not scheduled in this course.
Course Number	The course number. **Note:** Alternate course requests are noted with (Alt).
Course Name	The course name. **Note:** Alternate course requests are noted with (Alt).

How to Run the Room Schedule Report

Use the Room Schedule report to determine which courses are being taught in a particular room.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Room Schedule**. The Room Schedule page appears.
4. Click **Associate** to select the number of the room you want.
5. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

6. Click **Submit**. The report displays the following information:

Field	Description
Sec#	The section number of the course.
Expression	The period and days in which the course is taught.
Term	The term in which the course is taught.
Teacher	The name of the teacher instructing the course.
Course#	The course number.
Course	The course name.
Size	The number of students enrolled in the course. Click the number to display the class roster.

How to Run the Room Utilization Report

Use the Room Utilization report to verify that the system scheduled courses in the correct rooms, with the appropriate facilities, and at the correct times. You can also use this report to make sure that you correctly defined room capacities.

For each room, the system displays the courses that take place in the room by period. For each period, the system displays the number of available seats, scheduled students, and maximum seats.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Room Utilization**. The Room Utilization page appears.
4. Click **Associate** to select the rooms that you want to display on the report.
5. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

6. Click **Submit**. The report displays the following information:

Field	**Description**
Room	The room number and maximum seats for each room.
Day	The day the room is scheduled.
Terms	The terms that the room is scheduled.
Period	The course name, course and section number, teacher name, expression (period and day), term, number of taken seats, and number of seats available.

How to Run the Schedule Periods by Grade Report

Use the Schedule Periods by Grade report to view the number of students scheduled into courses by period, grade, and term.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Schedule Periods By Grade**. The Schedule Periods By Grade page appears.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The report displays the following information:

Field	**Description**
Term	The term number.
Expressions	The period and day combination.

Grade [number]	The number of unscheduled students, scheduled students, and total number of students for this grade level.

How to Run the Schedule Course Enrollment Report

Use the Scheduled Course Enrollment report to view the number of seats available, requested, occupied, and vacant per course. The report also displays the number of unfilled student requests for each course.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Schedule Course Enrollment**. The Schedule Course Enrollment page appears.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The report displays the following information:

Field	Description
Number	The course number.
Course Name	The course name.
Seats Available	The maximum enrollment for the course.
Primary Requests	The number of primary requests made for the course. Click the number to display the names of the students that requested the course. The Course detail page appears with the Primary Requests tab selected. To view other Course detail information, click a different tab.
Alternate Requests	The number of alternate requests made for the course. Click the number to display the names of the students that requested the course. The Course detail page appears with the Alternate

	Requests tab selected. To view other Course detail information, click a different tab. **Note:** The **Alt** checkbox on the Requests page must be selected to indicate that the request is an alternate course request.
Seats Filled	The number of fulfilled requests for the course. Click the number to display the names of the students enrolled in the course. The Course detail page appears with the Seats Filled tab selected. To view other Course detail information, click a different tab.
Seats Vacant	The number of empty seats in the course.
Unfilled Primary Requests	The number of unfulfilled primary requests for the course. Click the number to display the names of the students that requested the course but are not enrolled in it. The Course detail page appears with the Unfilled Primary Requests tab selected. To view other Course detail information, click a different tab.

How to Run the Schedule Results by Grade Report

Use the Schedule Results by Grade report to view a summary of how many students in each grade were fully scheduled and not scheduled. To give you a better indication of the success of your schedule, run this report after loading student schedules but before working with individual students' scheduled.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Schedule Results by Grade**. The Scheduling Results By Grade page appears.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The report displays the following information:

Field	Description

Students Scheduled	Next year's student grade level and the total number of students that submitted course requests for each grade level.
All Periods	When all periods are considered, the number and percentage of students in each grade that have a complete schedule and the number and percentage of students in each grade that do not have a complete schedule.
Core Periods	When only core periods are considered, the number and percentage of students in each grade that have a complete schedule and the number and percentage of students in each grade that do not have a complete schedule. Core periods are those that are flagged as such and are those in which the school expects students to be scheduled.
Requests Scheduled	Next year's student grade level and the total number of requests submitted by students for each grade level.
Including Alternates	When alternate course requests are considered, the number and percentage of students in each grade that have a complete schedule and the number and percentage of students in each grade that do not have a complete schedule.
Primary Requests Only	When only primary course requests are considered, the number and percentage of students in each grade that have a complete schedule and the number and percentage of students in each grade that do not have a complete schedule.

Student Schedule Reports

How to Run the Student Schedule List Report

Use the Student Schedule List report to view the number of courses scheduled by each student. You can also use this report to view each student's schedule.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student Schedule List**. The Student Classes Scheduled page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*. **Note:** Clicking on hyperlinks within the report may display a different page in PowerSchool, which will appear in your preferred language and not in the locale you selected for the report output.

5. Click **Submit**. The report displays the following information:

Field	Description
#	The numbered list of students.
Student	The student's name. Click the heading to sort the list by student name.
% Scheduled	The percent of the period/term combinations that were fulfilled. Click the heading to sort the list by percentage scheduled.
Classes Scheduled	The number of courses that have been scheduled for this student. Click the heading to sort the list by the number of classes scheduled. Click the number per student to view the student's Schedule page.

How to Run the Student Schedule Report

The Student Schedule Matrix allows you to produce and print student schedule reports with page breaks between students. Though this report can be viewed with Safari for Mac OS X and Microsoft Internet Explorer for Windows, other browsers may not display the report formatting appropriately.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student Schedule Report**. The Student Schedule Matrix Report page appears.
4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a title for the report.
Term to Display	Select from the pop-up menu which term to use for the report.
Students to scan	Select an option to indicate the students to include, if applicable.
Max Students per Page	Enter the maximum number of student reports to display per page.
Sort Order	Select an option to indicate the sort order: • **Last Name** • **(Next Year) Grade Level** • **Homeroom**
Show Other-School Enrollments	Select the checkbox to display any enrollments at other schools. The enrollments are based on the selected scenarios.
Color Sections By:	Select an option for the report colors: • **No Coloring**: Report displays no coloration. • **Section**: Report displays sections in the same color.

	• **Course**: Report displays courses in the same color.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

5. Click **Submit**. The Student Schedule Matrix appears.

How to Run the Student Schedule Matrix Report

The Student Schedule Matrix allows you to produce and print student schedules for the current year with page breaks between students. Though this report can be viewed with Safari for Mac OS X and Microsoft Internet Explorer for Windows, other browsers may not appropriately display the report formatting.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Student Schedule Report**. The Student Schedule Matrix Report page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a title for the report.
Students to scan	Select an option to indicate the students to include, if applicable.
Max Students per Page	Enter the maximum number of students to display per page.
Sort Order	Select an option to indicate the sort order.

Include Active Enrollments As Of	Enter a date to filter report results by the specified date of active enrollments. Use the format mm/dd/yyyy or mm-dd-yyyy.
Show Dropped Enrollments in Separate List	Select the checkbox to display a student's dropped enrollments below the student's matrix. A Withdrawn Classes table displays the enrollment information for each dropped course, including the date of withdrawal.
Bell Schedule for Period Start/End Times	Select from the pop-up menu which bell schedule to use to display the start and end times for each period.
Color Sections By:	Select an option for the report colors: • **No Coloring**: Report displays no coloration. • **Section**: Report displays sections in the same color. • **Course**: Report displays courses in the same color.

5. Click **Submit**. The Student Schedule Matrix appears.

Tips for Printing the Student Schedule Matrix Report

- Enable the printing of backgrounds. Shading and colorations in reports are all considered backgrounds. Not printing backgrounds may lead to illegible printouts.
- Turn off the printing of header information in your browser settings. If this is not off, each page printed may include the URL of this page, a page number, and a time stamp. These are generally not desired for this report.
- Use your browser's Print Preview function to confirm that the output is correct prior to sending to the printer. You may adjust text size using the text font size controls of your browser. You may also control the page orientation using your browser settings to fix table cells that span page breaks or reports that print too small.

How to Run the Under-Scheduled Students Report

Use the Under-Scheduled Students report to determine the number of students who have been under-scheduled for each period.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.

2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Under-scheduled Students**. The Under-Scheduled Students page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	Description
# of Blocks	The number of blocks, or units, available in the schedule. Units are periods multiplied by the number of days multiplied by the number of schedule terms. For example, a scenario with 2 days, 8 periods, and 4 terms would have 64 blocks.
Percent	The number of blocks divided by the total number of blocks possible.
# of Students	The number of students who have the corresponding number of blocks scheduled.
Percent	The percentage of the total number of students that have the corresponding number of blocks scheduled.

How to Run the Unscheduled Rooms Report

Use the Unscheduled Rooms report to determine the number of rooms that have not been scheduled for classes per term, period, and day.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Unscheduled Rooms**. The Unscheduled Rooms page appears.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The report displays the following information:

   Note: If each room is scheduled, the message "All rooms are fully scheduled" appears.

Field	Description
Term Period Day Description	The term, period, and schedule day in which there are unscheduled rooms.
# of Rooms	The number of unscheduled rooms for each term, period, and day. Click the number of rooms to display the list of rooms.

How to Run the Unscheduled Students Report

Use the Unscheduled Students report to determine the number of students who have not been scheduled into classes per term, period, and day. When making adjustments after loading student schedules, school counselors can use this report to find "holes" in student schedules.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Unscheduled Students**. The UnScheduled Students page appears.
4. Use the following table to enter information in the fields:

Field	Description

Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	Description
Term Period Day Description	The term, period, and schedule day in which there are unscheduled students.
# of Students	The number of unscheduled students for each term, period, and day. Click the number of students to display the list of students, from which you can select students and perform functions for the group of students.

How to Run the Unscheduled Teachers Report

Use the Unscheduled Teachers report to determine the number of teachers who have not been scheduled into classes per term, period, and day.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Unscheduled Teachers**. The UnScheduled Teachers page appears.
4. Select the **Report Output Locale** from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.
5. Click **Submit**. The report displays the following information:

Field	Description
Term Period Day Description	The term, period, and schedule day in which there are unscheduled teachers.
# of Teachers	The number of unscheduled teachers for each term, period, and day. Click the number of teachers to display the list of teachers.

How to Run the Percent Schedule By Students Report

Use the Percent Schedule By Students report to determine how successful your current schedule is based on percentage scheduled calculations for a given student for the active PowerScheduler scenario.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Percent Schedule By Students**. The Percent Scheduled By Students page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

5. Click **Submit**. The report displays the following information:

Field	Description
Student Name	Name of the student.
Next Year Grade	Students' grade levels for next year. This report sorts by next year grade level followed by student name.
# Requests	Number of course requests made by the student.
# Classes Scheduled	Number of classes scheduled for the student.
% Scheduled	Percent scheduled based on all possible time slots that can be scheduled according to periods, days, and terms.
% Core Periods	Percent of core periods scheduled based on all possible time slots that can be scheduled according to periods, days, and terms. Core periods are flagged as such and are the periods in which the school expects students to be scheduled.
% Primary Requests	Percent of primary requests (non-alternate requests) that were successfully filled.
% All Requests	Percent of total requests including alternate requests that were filled.

How to Run the Individual Student Conflict Matrix Report

Use the Individual Student Conflict Matrix report to identify whether it is possible to rearrange a student’s schedule so that more or all of their course requests can be fulfilled.

In the process of scheduling, it is inevitable that some students will not have all their requests fulfilled. This is often due to limited resource availability, but it can also be due to inherent limitations of using a scheduling engine. At some point, the effort that the engine expends investigating the different possibilities of a schedule runs into diminishing returns. While PowerSchool’s scheduling engine often reaches into the 90 percent fulfillment of requests range, manual intervention is necessary at some point to achieve an even higher percentage. Often it requires investigating students to identify why all of their requests were not scheduled.

While PowerSchool provides reports that identify unfilled requests, you must investigate various other reports to determine how, or even if, a particular request can be filled. Questions that a scheduling administrator might ask include: “Are any of the sections of the requested class available during an unscheduled period for the student?”, “If not, can I reschedule a filled class so that the student can be scheduled into the missed one?”, “Is there enough room in another class so that I can squeeze the student in?”. This report provides sufficient information for an administrator to begin answering these questions.

Note: As an example, consider four sections: Course A1 with no section type, Course A2 with a section type of Bilingual, Course B1 with no section type, and Course B2 with a section type of Bilingual. If a student requests Course A1 with an alternate of Course B and gets enrolled in B so that it appears as an alternate on the report, the report displays both sections of Course B but only one section of Course A. The same result appears if the student does not request Course B as a primary or alternate request but is enrolled in the course, anyway; all sections appear on the report regardless of section type.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Individual Student Conflict Matrix**. The Individual Student Conflict Matrix page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Select the students you want to run the report for: • Select **The selected students only** to run the report students in the current selection enrolled in the date range specified. • Select **All students** to run the report for all students in the current school enrolled in the date range specified.
Filter Students By	Select how you want students to be filtered: • Select **Students with requests** to view only students who have requests in the course request file.

	• Select **Include students with no requests** to view students with requests as well as those without any requests. • Select **Only students with unfilled requests** to view only students who have requests existing in the course request file with no corresponding scheduled course.
Sort Order	Select the sort order: • **Student Name** • **Grade Level** Many times scheduling administrators work with students on a grade-by-grade basis and it is useful to see all those students in the lowest grade first, then the next, and so on.
Enforce Teams	Select the checkbox so that only sections that belong to the student's team appear in the report. In case of an unassigned team, the section is listed.
Enforce Houses	Select the checkbox so that only sections that belong to the student's house appear in the report. In case of an unassigned house, the section is listed.
Enforces Buildings	Select the checkbox so that only sections occurring in a room belonging to the student's assigned building appear in the report. In case of an unassigned room, the section is listed.
Enforce Student Avoid	Select the checkbox so that only sections that do not violate an existing student-student avoid constraint for the students appearing in the report. In case the student is already enrolled in a section that violates this constraint, the section is listed.
Enforce Teacher Avoid	Select the checkbox so that only sections that do not violate an existing student-teacher avoid constraint for the student appear in the report.

	In case the student is already enrolled in a section that violates this constraint, the section is listed.
Enforce Free Time	Select the checkbox so that only sections that do not violate an existing student free time constraint appears in the report. In case the student is already enrolled in a section that violates this constraint, the section is listed.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

5. Click **Submit**. The report displays the following information:

Field	**Description**
Student Number	The student’s number.
Student Name	The student’s last name, first name, and middle initial.
Next Year Grade	The next year grade level of the student.
Requested	The classes for which a primary request exists for the student.
Alt	Identifies whether the request is an alternate request as opposed to a primary request.
Section Type	Identifies any section type that was part of the request.
Crs-ID	The course number of the requested (or alternate) course.
Course Name	The course name of the requested (or alternate) course.
Term	The term for which sections of the requested course has been scheduled.

[Period]	The period for which sections of the requested course have been scheduled.
Section Number	The identification number of the section (course number plus section) in which the student is enrolled. In the case of requests that were not scheduled, "Unscheduled" displays.
Expression	The period/day combination.
# Sec	The total number of sections that are available for the requested course.

How to Run the Teacher Maximum Load Report

Use the Teacher Maximum Load Report to identify teachers who are scheduled to teach more students in a day than is allowed by their contracts. This report displays expected loads based on the schedule in PowerScheduler. For more information about setting the value of a teacher's maximum load, see *Teacher Scheduling Setup*.

Sections can be exempted from counting towards a teacher's maximum load. For more information, see *Teacher Schedule*.

Note: A similar report is available for the current year, which is especially helpful when performing walk-in scheduling. For more information, see *How to Run the Teacher Maximum Load Report.*

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Teacher Maximum Load Report**. The Teacher Maximum Load page appears.
4. Use the following table to enter information in the fields:

Field	Description
Select a Teacher	Use the pop-up menu to select the teacher for whom you want to run this report. To select all teachers at the selected school, choose **All Teachers**.

Limit report to	Select an option to limit the results of the report: • **All Selected Teacher(s)**: Displays results for all teachers selected in the Select a Teacher field, even those whose schedules do not exceed their maximum loads. • **Only those over the limit**: Displays only the teachers selected in the Select a Teacher field that exceed the specified student load.
For this date	Enter a date to display report results as of the specified date. Use the format mm/dd/yyyy or mm-dd-yyyy.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

5. Click **Submit**. The report displays the following information:

Field	Description
No.	The teacher's number.
Teacher Name	The teacher’s last name, first name, middle initial.
Course	The name of the course that has a section contributing to the teacher's student load.
Section	The identification number of the section contributing to the teacher's student load. **Note:** To exempt a section from being included, see *Schedule Sections*.
Max	Maximum number of students allowed in the section.
Room	Room number of the section.

[Day]	Cycle day of the school's schedule, such as A or B.
Flag	Indicates whether a maximum load or section maximum has been exceeded.

PowerSchool Assessment User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool Assessment provides standards-based instructional assessment and analytical solutions that allow administrators and teachers to deliver measurable improvements in student performance. If your district or school has purchased PowerSchool Assessment along with PowerSchool's student information system, you can enable the pre-installed PowerSchool Assessment plugin so that administrators and teachers can access PowerAssessment functions via single sign-on links within PowerSchool.

Setup

Before you can access PowerSchool Assessment from within PowerSchool, perform the following setup items:

- View General Plugin Information (optional)
- View SSO (optional)
- Manage Link Details (optional)
- Configure School Access (optional)

  Note: PowerSchool Assessment is a multi-tenant, web-based application and has some special access considerations for administrators and teachers with PowerSchool SIS access to multiple schools. For more information, see the *Configure School Access* section of the *Plugin Management User Guide*.

- Enable Plugin
- Enable Customizations

Working with PowerSchool Assessment

Once PowerSchool Assessment is set up, users can launch PowerSchool Assessment from within PowerSchool while keeping their PowerSchool session active. This allows users to work in both applications simultaneously.

Note: The link only appears if the plugin is enabled, the link is set to display for the selected school, and if you belong to a user access role that has the capability associated to the link.

Launch PowerSchool Assessment in the PowerSchool Admin Portal

Use this procedure to launch PowerSchool Assessment in the PowerSchool admin portal.

How to Launch PowerSchool Assessment in the PowerSchool Admin Portal

1. Sign in to PowerSchool.

   Note: For more information about signing in to PowerSchool, see *The Basics User Guide* available on PowerSource.

2. Click the **Applications** button (an upward-right arrow) in the navigation toolbar. The Applications drawer slides into view.
3. Click the **[PowerSchool Assessment]** link. PowerSchool Assessment launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

4. When you are finished working in PowerSchool Assessment, be sure to sign out of PowerSchool Assessment.
5. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

Launch PowerSchool Assessment in PowerTeacher Pro Read Only Mode

Use this procedure to launch PowerSchool Assessment in PowerTeacher Pro in read only mode.

How to Launch PowerSchool Assessment in PowerTeacher Pro Read Only Mode (Teacher Schedules)

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. Click the **PowerTeacher Pro** button to launch a read-only version of the application.

How to Launch PowerSchool Assessment in PowerTeacher Pro Read Only Mode (Search Staff)

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, select **PowerTeacher Pro** from the staff pages menu to launch a read-only version of the application.

Launch PowerSchool Assessment in PowerTeacher Pro

Use this procedure to launch PowerSchool Assessment in PowerTeacher Pro.

How to Launch PowerSchool Assessment in PowerTeacher Pro

1. Sign in to PowerTeacher.

   Note: For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. Select the **PowerTeacher Pro** link on the main menu. PowerTeacher Pro launches.
3. On the charms bar, select **Assessment**. The Assessment sub-menu appears.
4. Use the links to navigate the functions:
   - Under Assessments, click **Manage Tests** to access the Assessment Library.
   - Under Assessments, click **Administer Test** to access the Testing Center.
   - Under Assessments, click **View Results** to access Assessment Reporting.
   - Under Interventions, click **Manage** to access Interventions.

   PowerSchool Assessment launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

5. When you are finished working in PowerSchool Assessment, be sure to sign out of PowerSchool Assessment.
6. When you are finished working in PowerSchool Assessment, be sure to sign out of PowerTeacher Pro.
7. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

How to Launch PowerSchool Assessment Reports in PowerTeacher Pro

1. Sign in to PowerTeacher.

   Note: For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. Select the **PowerTeacher Pro** link on the main menu. PowerTeacher Pro launches.
3. On the charms bar, select **Reports**. The Reports sub-menu appears.
4. Use the links to navigate the functions:
   - Under Assessments, click **View Results** to access Assessment Reporting.
   - Under Assessments, click **Achievement Records** to access Student Achievement Records.
   - Under Assessments, click **LDS Reporting** to access Longitudinal Data System Reporting (appears if PowerSchool Analytics is enabled).

   PowerSchool Assessment launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

5. When you are finished working in PowerSchool Assessment, be sure to sign out of PowerSchool Assessment.
6. When you are finished working in PowerSchool Assessment, be sure to sign out of PowerTeacher Pro.
7. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

PowerSchool Learning User Guide

PowerSchool

Student Information System

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool Learning is PowerSchool’s learning management and classroom collaboration solution. Educators can quickly create and deliver rich engaging lessons that facilitate 21st century learning, electronically provide feedback and grades, and collaborate and share best practices. PowerSchool learning streamlines teacher workflows and communication and seamlessly integrates third-party tools into one portal, so educators can spend more time teaching and less time managing, tracking, and grading assignments. If you use PowerSchool’s student information system, classes are automatically created, populated, and updated regularly in PowerSchool Learning and grades can be pushed automatically into the PowerTeacher Pro.

Setup

Before you can enable access to PowerSchool Learning from within PowerSchool, perform the following setup items:

- View General Plugin Information (optional)
- View SSO (optional)
- Manage Link Details (optional)
- Configure School Access (optional)
- Enable Plugin
- Enable Customizations
- Enable User Access Role

Working with PowerSchool Learning

Once PowerSchool Learning is set up, teachers can launch PowerSchool Learning from PowerTeacher portal, and students can launch the application from the PowerSchool Student and Parent portal. For more information, see the PowerTeacher Portal online help, or the PowerSchool Student and Parent Portal online help.

PowerSchool Registration User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool Registration is PowerSchool's add-on student enrollment and school choice system. PowerSchool Registration seamlessly facilitates new student enrollment, annual student registration, and year-round updates. PowerSchool registration provides the ability to register your students in PowerSchool and eliminates the need to print paper enrollment packets every year. If your district or school has purchased PowerSchool Registration along with PowerSchool's student information system, you can enable the PowerSchool Registration plugin so that administrators and teachers can access PowerRegistration functions via single sign-on links within PowerSchool.

Note: Each PowerSchool client using PowerSchool Registration will have one or multiple uniquely configured PowerSchool Registration plugins, which are provided by your PowerSchool Registration solutions support staff. If you are already a PowerSchool Registration customer, please have your organization’s technical contact email your PowerSchool Registration specialist to request your site's upgrade to the new PowerSchool Registration plugin.

Setup

Before you can access PowerSchool Registration from within PowerSchool, perform the following setup items:

- View General Plugin Information (optional)
- View SSO (optional)
- Manage Link Details (optional)
- Configure School Access (optional)
- Enable Plugin
- Enable Customizations

Working with PowerSchool Registration

Once PowerSchool Registration is set up, users can launch PowerSchool Registration from within PowerSchool while keeping their PowerSchool session active. This allows users to work in both applications simultaneously.

Note: The link only appears if the plugin is enabled, the link is set to display for the selected school, and if you belong to a user access role that has the capability associated to the link.

Launch PowerSchool Registration in the PowerSchool Admin Portal

Use this procedure to launch PowerSchool Registration in the PowerSchool admin portal.

How to Launch PowerSchool Registration in the PowerSchool Admin Portal

1. Sign in to the PowerSchool.

   Note: For more information about signing in to PowerSchool, see *The Basics User Guide* available on PowerSource.

2. Click the **Applications** button (an upward-right arrow) in the navigation toolbar. The Applications drawer slides into view.
3. Click the **[PowerSchool Registration]** link. PowerSchool Registration launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

4. When you are finished working in PowerSchool Registration, be sure to sign out of PowerSchool Registration.
5. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

Launch PowerSchool Registration in the PowerSchool Student and Parent Portal

Use this procedure to launch PowerSchool Registration in the PowerSchool Student and Parent portal.

How to Launch PowerSchool Registration in the PowerSchool Student and Parent Portal

1. Sign in to the PowerSchool Student and Parent portal.

   Note: For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Parent Portal User Guide* available on PowerSource.

2. Click the **Applications** button (an upward-right arrow) in the navigation toolbar. The Applications drawer slides into view.
3. Click the **[PowerSchool Registration]** link. PowerSchool Registration launches in a separate window (or tab depending on your browser settings).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

4. When you are finished working in PowerSchool Registration, be sure to sign out of PowerSchool Registration.
5. When you are finished working in PowerSchool, be sure to sign out of PowerSchool.

PowerSchool WS-Trust Bridge Administrator User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

PowerSchool WS-Trust Bridge

Using the WS-Trust protocol, your SAML Service Provider can now communicate with an Active Directory Federation Service (ADFS).

Notes:

- The PowerSchool WS-Trust Bridge plugin requires PowerSchool 9.0 or greater to be installed.
- For more information about the PowerSchool WS-Trust Bridge plugin, see the *PowerSchool WS-Trust Bridge* section of the *PowerSchool Developer Site* available on PowerSource.
- For information about SAML Service Provider, see the *PowerSchool as a SAML Service Provider* section of the *PowerSchool Developer Site* available on PowerSource.
- For PowerSchool issues, contact PowerSchool Technical Support.
- For ADFS issues, contact your ADFS service provider.

Setup

Before you can begin using the PowerSchool WS-Trust Bridge plugin, you will need to perform the setup items in this section.

Configure PowerSchool Installation Settings

In order for the PowerSchool WS-Trust Bridge plugin to function, the **PowerSchool WS-Trust Bridge** checkbox on the Deploy and Configuration Application page must be selected for all nodes during the PowerSchool installation process. For more information, see the *Installation Guide for PowerSchool 9.x* available on PowerSource.

Install PowerSchool WS-Trust Bridge

Once you have installed PowerSchool with the correct settings, you can then install the PowerSchool WS-Trust Bridge plugin.

How to Install PowerSchool WS-Trust Bridge

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Install**. The Plugin Install page appears.
5. Click **Browse…**. The Browse Plugins pop-up appears.
6. Click **Install** for **PowerSchool WS-Trust Bridge**. The pop-up closes, and a confirmation message appears.

View PowerSchool WS-Trust Bridge Plugin Information (Optional)

Once the PowerSchool WS-Trust Bridge plugin is installed, it appears in the Installed Plugins section on the Plugin Management Dashboard page.

How to View PowerSchool WS-Trust Bridge Plugin Information

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.

3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Use the following table to view information on this page:

Field	Description
Plugin Name	The name of the plugin.
Plugin Description	A description of the plugin.
Plugin Version	The version number of the plugin.
Publisher	The name of the publisher.
Publisher Email	The email of the publisher.
Enabled	Indicates whether or not the plugin is enabled.

Configure PowerSchool WS-Trust Bridge

Using the WS-Trust Bridge Setup for PowerSchool WS-Trust Bridge page, you can configure the bridge settings needed to establish a successful connection between your SAML Service Provider and your ADFS.

How to Configure PowerSchool WS-Trust Bridge

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Click **WS-Trust Bridge**. The WS-Trust Bridge Setup for PowerSchool WS-Trust Bridge page appears.
6. Use the following table to enter information in the fields:

Field	Description
Security Attribute Name	The name of the ADFS claim. Claims are used for authorization purposes.
Realm	The URL used by PowerSchool to communicate with ADFS. PowerSchool WS-Trust Bridge plugin installation defaults the value to the External Access on the Global Server Settings page.
Passive Address	The URL of the ADFS.
IDP Signing Cert	The name of the certificate used to sign the SAML response. The certificate must be the same as the certificate used by ADFS.
Encryption Cert	The name of the certificate used to encrypt the security token. The certificate must be the same as the certificate used by ADFS. **Note:** This field is optional.

7. Click **Save**. A confirmation message appears.

View SAML Service Provider Settings (Optional)

Using the SAML Service Provider Setup page, you can quickly and easily view detailed information about SAML Service Provider settings that have been added to PowerSchool as part of the PowerSchool WS-Trust Bridge plugin installation. Additionally, you can use this page to correct or update information as needed.

Note: This procedure is for a plugin that defines PowerSchool as a Service Provider. For a plugin that defines PowerSchool as a SAML Identity Provider, see *SAML Single Sign-On*.

How to View External Identity Provider Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.

4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Click **SAML Service Provider**. The SAML Service Provider Setup for PowerSchool WS-Trust Bridge page appears.
6. Use the following table to edit information in the External Identity Provider Settings fields:

Field	Description
Name	The external identity provider's name. **Note:** This field is read-only.
Entity ID	The external identity provider's public URL.
Metadata URL	The service provider's metadata URL. The value is supplied by the service provider, which allows the IDP to communicate with the service provider application.
View IDP Metadata	The external identity provider's IDP Metadata must match what is stored in PowerSchool. This information can be used to diagnose communication issues. 1. Click to view. A separate window appears. 2. When done viewing, close the window.

7. Click **Save**. A confirmation message appears.

How to View Local Service Provider Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Click **SAML Service Provider**. The SAML Service Provider Setup for PowerSchool WS-Trust Bridge page appears.

6. Use the following table to edit information in the Local Service Provider Settings fields:

Field	Description
Name	The local service provider's name.
Base URL	The local service provider's base URL. **Note:** This field is read-only.
Metadata URL	The local service provider's metadata URL. **Note:** This field is read-only.
Entity-ID	The local service provider's public URL. **Note:** This field is read-only.

7. Click **Save**. A confirmation message appears.

How to View PowerSchool User Identifying Elements for SSO

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Click **SAML Service Provider**. The SAML Service Provider Setup for PowerSchool WS-Trust Bridge page appears.
6. Scroll to the PowerSchool User Identifying Elements for Single Sign-On section.
7. Click **Cancel** when done viewing.

Manage Link Details (Optional)

Using the Link Details page, you can quickly and easily view detailed information about PowerSchool WS-Trust Bridge links that have been added to PowerSchool as part of the

PowerSchool WS-Trust Bridge installation. Additionally, you can control which schools can view the PowerSchool WS-Trust Bridge links.

Note: This procedure is only applicable if the plugin configuration file you installed declares navigation links.

How to Manage Link Details

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Click **Link Details**. The Link Details page for the selected plugin displays the following information for each portal:

Field	Description
[Portal]	The name of the portal: • Administrator Portal • Teacher Portal • Guardian Portal • Student Portal
Schools	For detailed information, see *Configure School Access*. **Note:** This setting controls only the display of links associated to a plugin. This does not restrict users from accessing content referred to by these links. Only the display of links based on the user's school context is affected.
Displayed in # / # Schools	Indicates the number of school the link displays in. **Note:** Only displays for Teacher Portal.
URL	The URL of the link, including <HostName>:<Port><Path>.

Display Text	The link title text appears.
UI Location	The location(s) where the link appears in the PowerSchool user interface.
SSO	Indicates whether or not the link is used for SSO.

Configure School Access (Optional)

Using the Link Display by School drawer, you can control which schools can view PowerSchool WS-Trust Bridge links.

Note: Third party links appear in PowerSchool based on the navigation links defined in the plugin configuration file.

Note: This procedure is not applicable to plugins that handle their own school level access.

Note: School-level permissions within PowerTeacher Pro 1.0 will use the permissions of the school from which PTP was launched.

How to Configure School Access

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **PowerSchool WS-Trust Bridge**. The PowerSchool WS-Trust Bridge Setup page appears.
5. Click **Link Details**. The Link Details page for the selected plugin appears.
6. Click **Schools** next to the portal for which you want to configure school access. The Link Display by School drawer opens.
7. Use the following table to enter information:

Field	Description
Schools Where Links Not Displayed	Schools that have not been granted access to the plugin appear.

	To grant access to a plugin, highlight one or more schools in the list and click the arrow (>). The selected school appears in the Schools with access to plugin column. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. To grant access to a plugin for all schools, click the double arrow (>>). All schools appear in the Schools with access to plugin column.
Schools Where Links Displayed	Schools that have been granted access to the plugin appear. To revoke access to a plugin, highlight one or more schools in the list and click the arrow (<). The selected school appears in the Schools without access to plugin column. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. To revoke access to a plugin for all schools, click the double arrow (<<). All schools appear in the Schools without access to plugin column.

8. Click **Submit**. The Link Display by School drawer closes, and a confirmation message appears.

Enable PowerSchool WS-Trust Bridge

By default, the PowerSchool WS-Trust Bridge plugin is not enabled. Once enabled, your SAML Service Provider can now communicate with an Active Directory Federation Service (ADFS).

How to Enable PowerSchool WS-Trust Bridge

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Select the **Enable/Disable** checkbox for the PowerSchool WS-Trust Bridge plugin. The Enable Plugin drawer appears.
5. Review the content.

Note: If you have installed a plugin that is dependent on page customizations, you must enable page customizations on the Customizations page. For more information, see *Customizations*.

Note: If PowerSchool encounters errors with the plugin, detailed information about the errors appears and you may not proceed with enabling the plugin.

6. Click **Enable** to proceed. A confirmation message appears.

How to Disable PowerSchool WS-Trust Bridge

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Deselect the **Enable/Disable** checkbox for the PowerSchool WS-Trust Bridge plugin. The Disable Plugin pop-up appears.
5. Click **Yes**. A confirmation message appears.

Restart PowerSchool

Restart all nodes of PowerSchool for the changes to take effect.

Reports User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool includes two types of reports: custom and preconfigured. Custom reports include form letters, mailing labels, report cards, and object reports. Preconfigured reports include reports related to attendance, grades, membership and enrollment, statistics, and student listings. Use the reports menu to run any custom or traditional report. Limit the group of students to report on by selecting a group of students before accessing the reports menu.

Group Reports

Select a group of students before running either preconfigured or custom reports.

How to Display the Reports Page

Display the reports page by selecting a group of students for whom you want to run a report. Alternately, you can choose **System Reports** under Reports in the main menu.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Printing, choose **Reports Menu**. The Reports page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Do one of the following:
   - Click the **System** tab to view *Preconfigured Reports.*
   - Click the **ReportWorks** tab to view *ReportWorks Reports.*
   - Click the **State** tab to view *State Reports*.
   - Click the **Engine** tab to work with the reporting engine.
   - Click the **Setup** tab to view *Custom Reports*.

System Report Queue

Use the System Report Queue to view, delete, cancel, and re-execute preconfigured reports that you submit to the queue. When you submit a report request to the system, the system captures the report request and transmits the job to the Report Queue. The Report Queue page displays the status of the report as it is processed by the system. The Report Queue also includes debugging tools and logs to troubleshoot problems with reports.

Reports are organized by tabs. The System tab displays all preconfigured reports, while the ReportWorks tab displays all submitted reports that were created in ReportWorks. For more information about viewing ReportWorks, see *ReportWorks Report Queue*.

To view all jobs in the report queue regardless of the user, view the report queue from the System Administrator menu. Administrators can also set preferences for the Report Queue. For more information, see *Report Queue Preferences*.

How to Set Automatic Page Refresh on the Report Queue

You can choose how often the ReportWorks report queue automatically refreshes. This feature is available on the System Reports Report Queue and the ReportWorks Report Queue.

1. On the start page, click the **Report Queue** button in the navigation bar.
2. Click the **System** tab. The Report Queue (System) - My Jobs page displays all your reports.
3. On the **Refresh** button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes.
4. Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection.
5. To cancel the automatic page refresh, click the arrow and select the **Cancel** button.

How to View System Reports in the Report Queue

You must run a report before performing this procedure. For more information, see *Custom Reports* or *Preconfigured Reports*.

1. On the start page, click the **Report Queue** button in the navigation bar.
2. Click the **System** tab. The Report Queue (System) - My Jobs page displays all your reports.
3. Do one of the following:
    - Click **Refresh** to update the page.
    - Click the cancel icon to stop running the report.
    - Click **View** to view the report once the Status column displays the status "Completed."
    - Click the Job Name of the report. The Report Queue Job Detail page displays details of the report job, and you can select either the **Cancel Job** or **Run job**

again checkbox, depending on whether the job has completed or not. For more information, see *How to View System Completed Report Details*.

- Click the trash icon to delete the completed report.

How to View Completed System Report Details

When a report runs completely, view the job details. For details on reports that are running or pending, see *How to View System Reports in the Report Queue*.

1. On the start page, click the **Report Queue** button in the navigation bar.
2. Click the **System** tab. The Report Queue (System) - My Jobs page displays all your reports.
3. Click the job name of the report. The Report Queue Job Detail page appears.
4. Use the following table to enter information in the fields:

Field	Description
User	The username of the person who ran the report appears.
School	The school name and number for the report appears.
Created	The date and time the report job started appears.
Job Name	The name of the report appears.
Type	The way in which the report is generated appears.
Reports	The name of the table that includes the data used for the report appears.
Status	The status of the report job appears: • **Completed**: Job is finished. • **Running**: Job is processing. • **Pending**: Job has not started. • **Canceled**: Job has been canceled.

Use the following table to enter information in the fields if the report has not completed:

Field	Description
Started	The date and time the report started running appears.
Ended	The date and time the report finished running will appear once completed.
Merger Action	If the report is a merger of multiple report definition (RPT) files, this field displays the text **MERGE**. If the report was not a merger report, nothing appears in this field.
Destination	The destination of the report appears, such as Browser.
When to Execute	The status of when the report will run appears.
Cancel Job?	Select the checkbox to cancel the execution of the report.

Use the following table to enter information in the fields if the report has completed:

Field	Description
Started	The date and time the report started running appears.
Ended	The date and time the report finished running appears.
Destination	The destination of the report appears, such as Browser.
When to Execute	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.

Run Job Again?	Select the checkbox to execute the report again.
Result File	Select the Result File to display the report.
File Size	The size of the file appears.

Use the following table to enter information in the fields if the report is pending completion:

Field	**Description**
Started	The date and time the report started running will appear once it executes.
Ended	The date and time the report finished running will appear once completed.
Merger Action	If the report is a merger of multiple report definition (RPT) files, this field displays the text **MERGE**. If the report was not a merger report, nothing appears in this field.
Destination	The destination of the report appears, such as Browser.
When to Execute	Select a different time to rerun the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.
Cancel Job?	Select the checkbox to cancel the execution of the report.

Use the following table to enter information in the fields if the report was canceled:

Field	**Description**

Started	The date and time the report started running appears.
Ended	The date and time the report stopped running appears.
Merger Action	If the report is a merger of multiple report definition (RPT) files, this field displays the text **MERGE**. If the report was not a merger report, nothing appears in this field.
Destination	The destination of the report appears, such as Browser.
When to Execute	Select a time to rerun the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.
Run Job Again?	Select the checkbox to execute the report again.
Error Message	Details regarding the cancellation of the report appear.
Error Code	The code used to cancel the report appears.

5. Click **Submit** to save your changes. PowerSchool runs the report, and the report queue appears. Depending on your specifications, this could take several minutes.
6. Click **View** to display the report.

How to View Report Queue Jobs

You must run a report before performing this procedure. For more information, see *Custom Reports* or *Preconfigured Reports*.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queue Settings page appears.

3. Click **Current Jobs**. The Report Queue - Current Jobs page displays the reports in the queue.
4. Do one of the following:
    - Click **Refresh** to update the page.
    - Click the job name of the report. The Report Queue Job Detail page displays details of the report job.
    - Select the **Cancel** checkboxes for the reports you want to cancel. Click **Cancel Selected Jobs**.

How to View Completed Report Queue Jobs

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queue Settings page appears.
3. Click **Completed Jobs**. The Report Queue - Completed Jobs page displays the reports.
4. Do one of the following:
    - Click **Refresh** to update the page.
    - Click the job name of the report. The Report Queue Job Detail page displays details of the report job.
    - Select the name of the result file to display the report.

How to Understand Report Queue Job Details

View report job details.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queue Settings page appears.
3. Click **Completed Jobs**. The Report Queue - Completed Jobs page displays the reports.
4. Click the job name of the report. The Report Queue Job Detail page appears.
5. Use the following table to enter information in the fields:

Field	Description
User	The username of the person who ran the report appears.

School	The school name and number for the report appear.
Created	The date and time the report job started appear.
Job Name	The name of the report appears.
Type	The way in which the report is generated appears.
Reports	The name of the table that includes the data used for the report appears.
Status	The status of the report job appears: • **Completed:** Job is finished. • **Running:** Job is processing. • **Pending:** Job has not started. • **Canceled:** Job has been canceled.
Started	The date and time the report started running appears.
Ended	The date and time the report finished running appears.
When to Execute	Select a time to run this report: • **ASAP:** Execute immediately. • **At Night:** Execute during the next evening. • **On Weekend:** Execute during the next weekend. • **On Specific Date/Time:** Execute on the date and time specified in the following fields.
Run Job Again?	Select the checkbox to run the report again.
Result File	Select the result file to display the report.
File Size	The size of the file appears.

Location on Server	The file location on the PowerSchool server appears. This information is available for completed jobs only.
Priority	Enter a priority for the report. Lower numbers give the report higher priority. This information is available for pending jobs only. You can further modify priorities on the user group security pages. For more information, see *How to Edit Security Groups*.

6. Click **Submit** to save your changes.

How to View the Report Queue Status

The Report Queue Status page displays information about past and current jobs in the report queue. The content of this page varies depending on the status of the report jobs. For example, you can cancel any jobs with the status Pending or Running, whereas you cannot modify Canceled or Completed jobs.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queue Settings page appears.
3. Click **Status**. The Report Queue Status page appears.
4. Use the following table to understand the fields in the Report Queue section:

Field	Description
Current status	Status of the entire report queue. The report queue can be running or not running. Other error or status messages pertaining to the entire report queue may appear.
Last restarted	Date and time of the last time the job was restarted.
Number of report processes	Number of report processes currently running in PowerSchool.

Automatically delete completed jobs after	Number of days that a job remains in the report queue. To modify this number, see *How to Set Report Queue Preferences*.
Maximum pending jobs per user	Maximum number of jobs any one user can have pending in the report queue. To modify this number, see *How to Set Report Queue Preferences*.
Result file location	Location of the report results on the PowerSchool server.

Use the following table to understand the fields in the Job Statistics section:

Field	**Description**
Currently running jobs	Number of jobs currently running.
Last job run	Date and time of the last job to run.
Jobs run today	Number of jobs run so far today.
Total jobs ever run	Number of jobs ever run in PowerSchool on this server.
Pending jobs on server	Number of jobs currently with the Pending status. Click the number to display the jobs.
Completed jobs on server	Number of jobs currently with the Completed status. Click the number to display the jobs.
Canceled jobs on server	Number of jobs currently with the Canceled status.
Total jobs on server	Number of jobs currently on the server with any status.

Use the following table to enter information in the Report Processes section:

Field	**Description**

Process Name	Names of the currently running report processes.
Jobs Run	Number of jobs run for each process.
Total Time	Total time each process took.
Status	The status of each process appears. If the job is running, the name of the report appears. Click the report name to display the job details. To cancel the report, select the checkbox and click **Cancel Selected Jobs**. When a job completes, the report name no longer appears in the Status column.

5. Click **Refresh** to update the page (optional).

ReportWorks Queue

Use the ReportWorks Queue to view, delete, cancel, and re-execute submitted reports.

Reports are organized by tabs. The System tab displays all pre configured reports, while the ReportWorks tab displays all submitted reports that were created in ReportWorks. For more information about viewing pre configured reports in the queue, see *System Report Queue*.

To view all jobs in the report queue regardless of the user, view the ReportWorks queue from the System Administrator menu. For more information, see *ReportWorks Administrator Report Queue*.

Administrators can also set preferences for the Report Queue. For more information, see *Report Queue Preferences*.

Note: When you submit a ReportWorks report, if heap memory exceeds 75 percent on the server, the report will automatically cancel, and a message appears on the Report Details dialog. When the report is submitted, the system will check the memory allocation at different intervals to assure memory usage does not exceed 95 percent while the report is being generated.

State Reporting Platform Reports

You can schedule when you want specific State Reporting Platform (SRP) reports to run using the Scheduling options, available on the report detail page of all SRP reports. Once submitted, the report displays on the Scheduled Reports section of the ReportWorks Report Queue in PowerSchool.

How to Set Automatic Page Refresh on the ReportWorks Report Queue

You can choose how often the Report Queue page refreshes. This feature is available on the System Reports Report Queue and the ReportWorks Report Queue.

1. On the start page, click the **Report Queue** button in the navigation bar.
2. Click the **ReportWorks** tab. The Report Queue (ReportWorks) - My Jobs page displays all of your reports.
3. On the **Refresh** button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes.
4. Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection.
5. To cancel the automatic page refresh, click the arrow and select the **Cancel** button.

How to View Reports in the Report Queue

1. On the start page, click the **Report Queue** button in the navigation bar.
2. Click the **ReportWorks** tab. The Report Queue (ReportWorks) - My Jobs page displays all of your reports. Pending or running reports appear in the Queued Reports section. All other reports appear in the Completed Reports section.
3. Click **Refresh** to update the page.
4. Use the following table to view information in the fields:

Field	Description
Created On	The date the report was generated appears.
Report Name	Click the name to open the Report Details dialog. For more information, see *How to View Completed Report Details*.
Started	The date and time the report job started appears.
Ended	The date and time the report job ended appears.

	Note: This field only displays in the Completed Reports section.
Created By	The username of the person who ran the report appears.
Output Type Icon	The output type of the associated report appears. Click the icon to view the report.
Status	The status of the report job appears: • Completed: Job is finished. Click the hyperlink to view the report. • Running: Job is processing. • Pending: Job has not started. • Canceled: Job has been canceled.
Options	Icons appear depending on the status of the report. • Click the trash can icon to delete a report. • Click the cancel icon to cancel a running report. • Click the regenerate icon to re-run the report.
Delete All	Click to delete all completed reports listed. **Note:** This field only displays in the Completed Reports section.

How to View Completed Report Details

When a report runs completely, view the job details.

1. On the start page, click the **Report Queue** button in the navigation bar.
2. Click the **ReportWorks** tab. The Report Queue (ReportWorks) - My Jobs page displays all of your reports.
3. Click the **Report Name**. The Report Details dialog appears.
4. Use the following table to view information in the fields:

Field	Description

Report Name	The name of the report appears.
Description	The report description appears.
Status	The status of the report job appears: - Completed: Job is finished. Click the hyperlink to view the report. - Running: Job is processing. - Pending: Job has not started. - Canceled: Job has been canceled.
Created On	The date the report was generated appears.
Create By	The username of the person who ran the report appears.
Started	The date and time the report job started appears.
Ended	The date and time the report job ended appears.
Error Code	The code used to cancel the report appears.
Error Message	Details regarding the cancellation of the report appear.
Parameter Name	Lists the runtime option name(s) selected when running the report.
Parameter Value	List the runtime option value(s) selected when running the report.

5. Click **Close Details** to close the dialog.

Report Structure

Knowing how a report is structured will help you understand how to set up a report. All parts of a report are not used in every report, but you should know what each part does. In most cases, you decide which parts to include on the final report.

Report Listings

PowerSchool pulls this report data according to your specifications. Report listings are also known as schedule listings.

Title

This title appears at the top of the final report. It should be descriptive but brief.

Header

This information appears above the report listings. It can be an opening to a letter or a description of the data to follow.

Footer

This information appears below the report listings. It can be a closure to the report or instructions on how to proceed.

Body/Statement

This text appears on the report. It can be placed above or below the report listings.

Database Extensions

Any database extensions created in PowerSchool are available to use on reports. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.

HTML Tags

HTML stands for hypertext mark-up language, which is most often used to create Web pages. Because PowerSchool is a Web-based system, some HTML is also used to format PowerSchool reports. HTML tags give special characteristics to text in your reports. You can employ HTML tags in a PowerSchool report to center, bold, or italicize text. The following are a few examples of commonly used HTML tags:

- <b> = bold text
-
 = inserts a line break
- <p> = paragraph break; inserts a space between reports

PowerSchool Data Codes

PowerSchool data codes insert data into reports through a merge process similar to that used in word processing applications. You use the data codes to tell PowerSchool what fields you want in the report. PowerSchool pulls the data from those fields for the selected student or group and inserts that data into the report. While HTML tags are programming codes, PowerSchool data codes are specific to PowerSchool and are used to merge data from the PowerSchool database. The following are some common PowerSchool data codes:

- ^(*credit_hours) = number of cumulative credit hours the student has earned
- ^(*gpa;Q3) = student's GPA for third quarter
- ^(grade_level) = student's grade level
- ^(He/She) = correct pronoun for each student based on the Gender field
- ^(he/she) = correct pronoun for each student based on the Gender field
- ^(him/her) = correct pronoun for each student based on the Gender field
- ^(His/Her) = correct pronoun for each student based on the Gender field
- ^(his/her) = correct pronoun for each student based on the Gender field
- ^(lastfirst) = student's last name, first name
- ^(schoolname) = name of the school
- ^(son/daughter) = correct pronoun for each student based on the Gender field
- ^(yearname) = school year
- ^[time] = prints the current time

Note: The asterisk (*) is used to indicate that data must be calculated.

For more information about data codes, see PowerSource.

Report Formatting

Many PowerSchool reports are generated in your Web browser application and are formatted for you. However, some reports require formatting before PowerSchool can generate them. Modifiable parameters include header and footer text, margin size, font, line height, and grid lines. In many cases, you do not have to make any changes to the default values that appear when you open a new template. However, you have the option of changing the format of certain reports.

When report formats can be altered, you have the option of changing some or all of the settings. When you change a setting, it becomes the default for anyone who uses the report unless you change it back. Note that not all of the settings appear on every report, and that the following list is not all-inclusive.

The following table describes each function:

Item	**Description**
Margins	This is the space at the top, bottom, and sides of the report. Margins are set in inches.
Font	This is the text style. Choose the font from the pop-up menu.
Font Size	This is the size of the letters. It is set in points (72 points = 1 inch).
Frame	This is the border of a report.
Justification/Alignment	This refers to how the text or listings are lined up horizontally on the page: • Left justification means that all lines start from the specified point on the left side of the page with each line ending at a different point on the right (depending on the number of characters in each line). • Right justification means that all lines start from the specified point on the right side of the page with each line ending at a different point on the left (depending on the number of characters in each line).

	• Centered justification means that each line is centered on the page, making the left (beginning) and right (ending) points different for each line. • Full justification means that all lines begin at a specified point on the left side of the page and end at a specified point on the right side of the page; spacing is adjusted between words and letters of words to accommodate this setting.
Line/Text Height	This is the height of a line of data. It is set in points (72 points = 1 inch).
Line/Frame Width	This is the thickness of a line or the lines making up the frame. It is set in points (72 points = 1 inch).
Rule Thickness	This is the thickness of the grid lines on a roster. It is set in inches.
Gutter Width	This is the distance between reports when more than one is printed on a page. It is set in columns and rows.
Padding	This is the amount of space around the text. It is set in inches and can be horizontal or vertical spacing.
Rounding	This refers to how square or rounded the corners of the frame are. The higher the number, the rounder the corner.
Where to Start Listing (X,Y)	This indicates the place on the page where the report is located. X is the distance from the left side of the page; Y is the distance from the top of the page. It is set in inches.
Horizontal Offset	This refers to the amount of space between X,Y points (see above) and the start of the listings. It is set in inches.
Horizontal/Vertical Change	This is the amount of horizontal or vertical space between line objects in an object report. It is set in inches.

Schedule Listings	These are the columns of data to be included on the report. Usually one column represents one PowerSchool data field.
Orientation	This is the page layout. Portrait is a vertical page; landscape is a horizontal page.
Reduction	This refers to the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing. Reduction is also known as scale.

Report Styles

An important part of how your custom reports look is the fonts that are used. Perhaps you like report titles to be in large, bold, capital letters. Perhaps you prefer that footer text be small and italicized. So that you don't have to set these preferences each time, PowerSchool provides several styles you can use. Create new styles according to your own preferences and needs.

How to Add a Report Style

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Styles**. The Styles page appears.
4. Click **New**. The Edit a Style Definition page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Style Name	Enter the name of the style.
Font	Choose the font from the pop-up menu.
Font Style	Select the checkboxes to make the font style bold, italic, or underlined. Select any combination of the checkboxes.

Font Size	Enter the font size in points. **Note:** One point is 1/72 of an inch.
Line Height	Enter the height for the space between lines on the report in points. **Note:** One point is 1/72 of an inch.
Alignment	Choose the alignment from the pop-up menu.
Use This as the Default System Style	Use the pop-up menu to indicate to want this style to be the default system style by selecting **Yes** or **No**. If you select Yes, the style will be used as the default font for all reports unless you specify otherwise.

6. Click **Submit**. The Styles page shows that the new style has been added to the list. You can create several styles or edit an existing one by clicking the name of the style. All PowerSchool users have access to all styles on the list. Contact other users before changing the default style.

Run, Print, and Save Reports

Use a template to pull data from the PowerSchool system and print a hard copy. To create and import report templates, see *Custom Reports* and *Report Templates*.

How to Run a Report for a Single Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Functions** from the student pages menu. The Functions page appears.
3. Click **Print Reports For This Student**. The Print a Report page appears.
4. Use the following table to enter information in the fields:

Field	Description
Print the report for	The selected student appears.

Which report to print	Choose the report from the pop-up menu. Types of reports are separated in the pop-up menu by dashes. The first group of reports are Form Letters. The second group of reports are Report Cards. The last group of reports are Object Reports.
If printing student schedule, use...	If you selected a Report Card in the "Which report to print" field, select an option to indicate enrollment specifications. If you select the "enrollment as of" option, enter the enrollment date in the field using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the "Which report to print" field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the "Date Range," enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format,

	an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. **Note:** When generating object reports, certain report text may appear in the default English language. For more information, see *Object Reports*.

5. Click **Submit**. The report queue appears.
6. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application.

How to Run a Report for a Group of Students

Run this report card-based report for a group of students to display the schedule listing for the current school year.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Printing, choose **Print Reports**. The Print Reports page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description

Which report would you like to print?	Choose the report from the pop-up menu. Types of reports are separated in the pop-up menu by dashes. The first group of reports are Form Letters. The second group of reports are Report Cards. The last group of reports are Object Reports.
For which students?	Select one of the following options to indicate the students for whom the report will be run: • **All records in a single batch**: Prints the report as a single job • **Print only the first [X] records**: Prints the report for only the first specified number of records. • **All records in batches of [X] records**: Prints the report in the specified number of batches. **Note:** The report jobs are automatically named with the text “Batch X of Y” followed by the report name, where X is the batch number and Y is the total number of batches. The total number of batches is determined by the size of the original selection and the size of a batch. For example, if there are 1,012 records in the selection, and the batch size is set to 50, there will be 21 total batches: 20 batches of 50 records and a 21st batch containing the final 12 records.
In what order?	Select the sort order.
If printing student schedules, use...	If you selected a Report Card in the "For which students?" field, select an option to indicate enrollment specifications. If you select the "enrollment as of" option, enter the enrollment date in the field using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
If printing fee list, only include transactions conducted during...	If you selected an Object Report in the "For which students?" field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the "Date Range," enter the beginning and ending dates in the fields using the

(may be overridden in report setup)	format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. **Note:** When generating object reports, certain report text may appear in the default English language. For more information, see *Object Reports*.

5. Click **Submit**. The report queue appears.
6. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application.

How to Print a Report

1. Run a report that creates a PDF.
2. View the report in your Web browser or in Adobe Acrobat Reader.
3. Choose **File** > **Print** from the menu bar.
4. Make the necessary selections in the Print dialog.
5. Click **OK**. The report prints as you view it on the page.

How to Save a Report

Save the data from a particular report. Saving a report creates a snapshot of the data. The saved report will not continue to display current information as the PowerSchool system is continuously updated.

Note: Not all reports can be saved.

1. Run a report that creates a PDF.
2. View the report in your Web browser or in Adobe Acrobat Reader.
3. Choose **File** > **Save As** from the menu.
4. Enter a file name for the report. If you think you will forget it, write it down.
5. Click **Save**. The report is saved. Open it using a procedure similar to opening a document in a word processing or spreadsheet application.

Alternate Ways to Create Reports

There are some shortcuts to creating a report from scratch. One way is to use a report template that someone else has already created. The second way is to copy a template that is already on your PowerSchool system. The third way is to create a template in a word processing application and paste it into a PowerSchool template.

How to Use a Template From Another PowerSchool System

There are two parts to using an existing template. First, download (or export) it from a PowerSchool system. Then, import it to a second PowerSchool system for the person who wants to use it. This process is just like copying a document from one hard drive to your own. The only difference is that you are copying a report template from one PowerSchool system to another. For more information, see *Report Templates*.

How to Copy a Template From Your PowerSchool System

Use the procedures discussed in the section *Report Templates* to copy a template on your own PowerSchool system and import it back to the same PowerSchool system. This is helpful when you need a report similar to an existing one with only minor changes. Be sure to give the template a different name so that you do not end up with two templates of the same name. Once the template is in PowerSchool, edit the parameters to create a new one. This is similar to using the Save As option in many applications. Open an existing document and save it under a different name to save it as two documents. Keep the one in its original format and edit the other.

How to Create a Template in Another Application

This method can be helpful if you do not feel comfortable working outside of a word processing application. You can create the template in an application you know with minimal time spent entering HTML tags and PowerSchool data codes. The idea is to create the template using a word processing application and then paste it into a PowerSchool template, while replacing the appropriate sections with some HTML tags and PowerSchool data codes. To create PowerSchool templates, create and save *Report Cards*, *Mailing Labels*, *Form Letters*, and *Object Reports* to reuse as templates.

System Reports

PowerSchool includes a number of preconfigured system reports that allow you to start analyzing data right away. System reports contain information that PowerSchool administrators need most often and include parameters, which you can use to filter and sort the data displayed on these reports.

For details on all system reports, see *Attendance Reports*, *Attendance Count and Audit Reports*, *Discipline Reports*, *Grade and Gradebook Reports*, *Membership Reports*, *Enrollment Reports*, *Scheduling*, *Parent/Student Access Statistics*, and *Student Listings*. You are also encouraged to see the section *Custom Reports* before creating a report to give you an understanding of the process of creating reports, which will make running reports much easier.

While you can run all reports on individual students, you can also run many for a selected group of students. If a report allows group reporting, first select the group of students. For more information, see *Select a Group of Students*. Click the PowerSchool logo to return to the start page and begin work on a report. PowerSchool remembers the group and prompts you to select it when you enter the report parameters.

Shared Section Reports

If a section is shared between multiple teachers, some reports will display all sections associated with a teacher, and all teachers associated with a section, as long as the teacher roles are active and assigned to that section during the selected term or date specifications.

- *Absentee*
- *Attendance Count*
- *Class Attendance Audit*
- *Consecutive Absences*
- *Student Attendance Audit*
- *Monthly Student Attendance Report*
- *Attendance Summary by Grade*
- *Year-to-Date Attendance Summary*
- *PowerTeacher Attendance*
- *Weekly Attendance Summary (Meeting)*
- *Weekly Attendance Summary (Daily)*
- *Period Attendance Verification*

Attendance Tracking and Notification

- *Refresh Attendance Tracking Data Report*
- *Truancy View Report*
- *Truancy Extracts Report*
- *Truancy and Attendance - Levels Reached Report*

Discipline

- Discipline Log
- Discipline Summary

Grades and Gradebooks

- *Class Ranking*
- *Grade Count* or *by Teacher*
- *Grades Distribution*
- *Graduation Progress Report (PDF)*
- *Honor Roll*
- *Teacher Gradebooks*

Membership and Enrollment

- *ADM/ADA by Date*
- *ADM/ADA by Student*
- *ADM/ADA by Minute*
- *Aggregate Membership Audit*
- *Class Size Reduction Report*
- *Enrollment by Grade*
- *Enrollment by Section*
- *Enrollment Summary by Date*
- *Vocational Courses Aggregate Membership*
- *School Enrollment Audit*
- *Section Enrollment Audit*

Plugins

- *Plugins Resource Report*

Scheduling

- *Student Program Balancing*
- *Teacher Maximum Load Report*

Statistics

- *Parent/Student Access Statistics*

Student Listings

- At Risk
- *Class Rosters (PDF)*
- *Master Schedule (PDF)*
- *Student Schedule Listing*

Attendance Reports

Before producing attendance reports, you are encouraged to ask your PowerSchool administrator how your school calculates attendance. For example, does your school report how many days students are present or how many days they are absent?

Access Attendance Reports

While you can run all attendance reports for individual students, you can also run many for a selected group of students. If an attendance report allows group reporting, select that group of students before running the report. If you select a group of students from the start page, the Group Functions page appears either immediately or after selecting students from the Student Selection page.

Note: For detailed information about a specific report, see the Attendance section of the *Reports User Guide* on PowerSource.

How to Access Attendance Reports

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, the following attendance reports appear:

Field	Description
Absentee	Click to view single day period-by-period attendance code report. For more information, see *Absentee Report*.

Attendance Count	Click to view multi-day period-by-period attendance code report. For more information, see *Attendance Count Report*.
Class Attendance Audit	Click to view section specific attendance roster. For more information, see *Class Attendance Audit*.
Consecutive Absences	Click to view report detailing consecutive student absences by absence code. For more information, see *Consecutive Absences Report*.
Student Attendance Audit	Click to view roster report detailing attendance codes by day. For more information, see *Student Attendance Audit*.
Monthly Student Attendance Report	Click to view twenty-day student attendance report by grade. For more information, see *Monthly Student Attendance Report*.
Attendance Summary by Grade	Click to view an aggregated attendance report for a date range and grade(s). For more information, see *Attendance Summary by Grade Report*.
Year-to-Date Attendance Summary	Click to view a year-to-date aggregated attendance report by grade. For more information, see *Year-to-Date Attendance Summary*.
PowerTeacher Attendance	Click to view report showing which teachers have not taken attendance. For more information, see *PowerTeacher Attendance Report*.
Weekly Attendance Summary (Meeting)	Click to view a weekly attendance summary by section. For more information, see *Weekly Attendance Summary (Meeting)*.
Weekly Attendance Summary (Daily)	Click to view a weekly attendance summary by Teacher. For more information, see *Weekly Attendance Summary (Daily)*.

Period Att. Verification	Click to view report showing students marked present a specified number of periods. For more information, see *Period Attendance Verification Report.*

Note: To search for students with perfect attendance, see *Advanced Search and Select*.

Absentee Report

Use the Absentee report to generate single-day period-by-period attendance code information. For example, you can use this report to search for students who received an unexcused absence code for the previous day. You can then contact the students' guardian to verify whether or not the student actually has an excused absence.

Note: You can search on any absent or present attendance code that is stored in the database. However, instances where the absence of an attendance code indicates a presence is not searchable as an attendance code value is not stored in the database.

Note: You can also access this report by clicking **Attendance > Absentee Report**.

How to Run the Absentee Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Absentee**. The Absentee Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report: • **Use Default**: searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to

	effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: searches for and displays report output by day. • **Meeting**: searches for and displays report output by period. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration. For the Use Default menu option to appear, FTEs must be set up and the "Use default settings" checkbox on the Attendance Preferences page must be selected. For the Daily or Meeting menu options to appear, the Daily or Meeting checkboxes on the Attendance Preferences page must be selected.
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • **The selected students only** to run the report for students in the current selection enrolled in the specified date range. • **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the "Students to Include" section and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the "Students to Include" selection.
Attendance Codes	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the attendance codes you want to scan.

Date to Scan	Enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Periods	If **Meeting** has been chosen from the Attendance Mode pop-up menu, select the checkboxes of the periods you want to scan or leave all the checkboxes blank to scan all periods. **Note:** If **Daily** has been chosen from the Attendance Mode pop-up menu, periods do not apply.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.

Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Include Student Number	Select the checkbox to include the student numbers on the report.
Number of Blank Lines Below Student Names	Enter the number of blank lines to include as separators after each student name.
Include Verification Line	Select the checkbox to include one line for each student where the following can be recorded on the report: talked to, relationships, reason, verify date, and employee.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Do one of the following:
   - Click a name to open the student pages menu and work with that student.
   - Click **Functions** at the bottom of the report to open the Group Functions page. For more information about what you can do from that menu, see *Work with Groups*.
   - Click **Find teachers who have not taken attendance** to identify teachers who have not yet taken attendance. For more information about this function, see *How to Run the PowerTeacher Attendance Report*.
   - Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Consecutive Absences Report

Use the Consecutive Absences report to generate a report detailing consecutive student absences by absence code. The report can be run in either daily or meeting mode. In daily mode, the report searches for students with consecutive absences codes in their daily attendance record. In meeting mode, the report searches each student's attendance records period by period for consecutive absence codes.

Note: You can also access this report by clicking **Attendance > Consecutive Absences**.

How to Run the Consecutive Absences Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Consecutive Absences**. The Consecutive Absences Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Use Default**: Searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: Searches for and displays report output by day. • **Meeting**: Searches for and display report output by period. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration. For the Use Default menu option to appear, FTEs must be set up and the “Use default settings” checkbox on the Attendance Preferences page must be selected. For the Daily or Meeting menu options to appear, the Daily or Meeting checkboxes on the Attendance Preferences page must be selected.
Attendance Codes	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the attendance codes you want to scan.

Attendance Codes	Select the attendance code for which you want to scan for the report. **Note:** Only one attendance code can be selected at a time.
Begin Date and Ending Date	Enter the beginning and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu,

	choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Number of Consecutive Days to Scan	Enter the number of consecutive days of an attendance code must occur.
Scan	Use the pop-up menu to indicate whether you want to run the report for: • **All Enrollment Records** - All students with an enrollment record in the current school. • **Current Enrollment Records** - Only students that are actively enrolled in the current school on the date the report is run.
Include Student Number	Select the checkbox to include the student numbers on the report.
Itemize by Day	Select the checkbox to further parse the scan by cycle days selected. **Note:** This checkbox appears only for schools with multi-day schedules.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Do one of the following:
    - Click a name to open the student pages menu and work with that student.
    - Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Monthly Student Attendance Report

Use the Monthly Student Attendance report to display attendance per student per day, including holidays. This report displays the days the student was not enrolled, absent, or in attendance. The days in session and carry forward, gains, losses, and ending enrollment appear at the end of the report.

By default, the codes and values included in the report represent full days of absences and attendance even if the school is set up with attendance conversions that count partial absences and attendance. When attendance is calculated using the Attendance Conversions (defined in School Setup > Attendance Conversions), it is possible to get an attendance value of, for example, 1.5 for a 2-day period, meaning they were absent half a day in those two day periods. But the Monthly Student Attendance report does not report a 1.5 attendance. It reports 2 full days of attendance and 0 absences. It does not count half-day absences.

To include codes and values for partial day absences and attendance, select the Include Partial Attendance checkbox before submitting.

How to Run the Monthly Student Attendance Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Monthly Student Attendance**. The Monthly Student Attendance Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Use Default**: Searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: Searches for and displays report output by day. • **Meeting**: Searches for and displays report output by period. • **Interval**: Searches for and displays report output by interval.

<table>
<tr><td></td><td>For more information about attendance modes, see Attendance Overview.

Note: Menu options appear based on your attendance setup configuration. For the Use Default menu option to appear, FTEs must be set up and the “Use default settings” checkbox on the Attendance Preferences page must be selected. For the Daily or Meeting menu options to appear, the Daily or Meeting checkboxes on the Attendance Preferences page must be selected.</td></tr>
<tr><td>Attendance Conversion</td><td>Use the pop-up menu to select the method by which attendance is calculated for which you want to run this report. Menu options appear based on the Attendance Mode selected.
If the Attendance Mode of Use Defaults was selected, Use Defaults appears by default. There are no other menu options to choose from.
If the Attendance Mode of Daily was selected, choose either Code to Day, Percent Time to Day, or Time to Day. If the Attendance Mode of Meeting was selected, choose Percent Period to Day, Percent Time to Day, Period to Day, or Time to Day.
If the Attendance Mode of Interval was selected, choose Time to Day.
For more information about attendance conversions, see Attendance Overview.</td></tr>
<tr><td>Students to Include</td><td>Indicate which students you want to run the report for by selecting one of the following options:
The selected students only to run the report for students in the current selection enrolled in the specified date range.
Select All students to run the report for all students in the current school enrolled in the specified date range.</td></tr>
</table>

Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the "Students to Include" section and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the "Students to Include" selection.
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.

Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Include Student Number	Select the checkbox to include the student numbers on the report.
Include Partial Attendance	By default, the codes and values included in the report represent full days absences and attendance even if the school is set up with attendance conversions that count partial absences and attendance. To include codes and values for partial day absences and attendance, select the Include Partial Attendance checkbox before submitting.
The report will break to a new page for each	Use the pop-up menu to indicate how you want page breaks to be applied. **Note:** Do not run this report for reporting segments if segments are longer than 20 school days. Also, you must have the Reporting Segments option selected above when using this option.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

PowerTeacher Attendance Report

Use the PowerTeacher Attendance report to generate a list of which teachers have not taken attendance. Schools commonly use this report to verify that all teachers have taken attendance.

How to Run the PowerTeacher Attendance Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **PowerTeacher Attendance**. The PowerTeacher Attendance page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Date to Scan	Enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Periods	Select the checkboxes of the periods you want to scan or leave all the checkboxes blank to scan all periods.
Lines per page	Enter the number of data rows you want to appear on each page of the report.
Starting Page Number	Enter the page number from which you want the report to start.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening.

	• **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.

   Note: If you entered a date where school is not in session, the message "School is not in session on date specified" appears. If all teachers have entered attendance, the message "All teachers have taken attendance" appears.

5. Do any of the following:
   - Click a meeting to get more details about the section. The Course Information page appears.
   - Print or save the report. For more information, see *Run, Print, and Save Reports*.

Weekly Attendance Summary (Meeting) Report

Use the Weekly Attendance Summary (Meeting) report to generate a weekly attendance summary by section. Schools commonly use this report to verify weekly attendance for each section. Teachers sign the report to certify that the attendance they marked is accurate. You can also use this report to generate a verification sheet for daily attendance for a specific week. Teachers sign the report to certify the attendance they marked is accurate.

How to Run the Weekly Attendance Summary (Meeting) Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Weekly Attendance Summary (Meeting)**. The Weekly Attendance Summary (M) Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Weeks	Choose the week to scan from the pop-up menu.
Teachers	Select the teachers for which you want to scan or select **ALL TEACHERS**. To select multiple teachers, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the teacher you want to scan. **Note:** For a staff member to appear in this list, the Staff Status field (accessible via Start Page > Staff > Select A Staff Member > Edit Information) must set to **Teacher** and **Current**.
Periods	Select the checkboxes of the periods you want to scan or leave all the checkboxes blank to scan all periods.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.

Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Meeting Mode**: Searches for and displays report output by period. • **Interval Mode**: Searches for and displays report output by interval. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration.
Attendance Codes	Enter in the appropriate fields the attendance codes to scan: • **Absent** • **Unexcused** • **Tardy** **Note:** Use a comma to separate multiple attendance codes. Do not use a blank space between the comma and the attendance code.

Show Sections	Use the pop-up menu to indicate whether you want either all sections or only sections containing the selected attendance codes to appear in the report.
Audit Students	Indicate which students you want to run the report for by selecting one of the following options: • **Currently Enrolled in Class** to run the report for students who are currently enrolled in the class. • **Ever in Class** to run the report for students who are currently enrolled or have ever been enrolled in the class.
Include Student Number	Select the checkbox to include student numbers on the report.
Include Verification Line	Select the checkbox to include a verification line on the report. The verification line can be used to "sign off" on the accuracy of the report.

4. Click **Submit**. The report results appear based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Weekly Attendance Summary (Daily) Report

Use the Weekly Attendance Summary (Daily) report to generate a weekly attendance summary by teacher. Schools commonly use this report to verify weekly attendance for each teacher. Teachers sign the report to certify that the attendance they marked is accurate. You can also use this report to generate a verification sheet for daily attendance for a specific week. Teachers sign the report to certify the attendance they marked is accurate.

How to Run the Weekly Attendance Summary (Daily) Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.

2. On the System tab, click **Weekly Attendance Summary (Daily)**. The Weekly Attendance Summary (D) Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field/	**Description**
Weeks	Choose the week to scan from the pop-up menu.
Teachers	Select the teachers for which you want to scan or select **ALL TEACHERS**. To select multiple teachers, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the teacher you want to scan. **Note:** For a staff member to appear in this list, the Staff Status field (Start Page > Staff > Select A Staff Member > Edit Information) must set to **Teacher** and **Current**.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

	Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Attendance Codes	Enter the attendance codes to scan in the appropriate fields: • **Absent** • **Unexcused** • **Tardy** **Note:** Use a comma to separate multiple attendance codes. Do not include blank spaces between the comma and the attendance code.
Include Student Number	Select the checkbox to include student numbers on the report.
Include Verification Line	Select the checkbox to include a verification line on the report. The verification line can be used to "sign off" on the accuracy of the report.

4. Click **Submit**. The report results appear based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Period Attendance Verification Report

Use the Period Attendance Verification report to generate a list of students marked present a specified number of periods.

How to Run the Period Attendance Verification Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.

2. On the System tab, click **Period Attendance Verification**. The Period Attendance Verification Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	**Description**
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Meeting**: Searches for and displays report output by period. • **Interval**: Searches for and displays report output by interval. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration.
Weeks	Choose from the pop-up menu the week to scan.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.

Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Find the number of students who are marked present for this number of periods (or intervals) in each day*	To search for the number of students who are marked present for a given number of periods (or intervals) in each day, enter a value is this field.
Audit Students	Indicate which students you want to run the report for by selecting one of the following options: • **Currently Enrolled in Class** to run the report for students who are currently enrolled in the class. • **Ever in Class** to run the report for students who are currently enrolled or have ever been enrolled in the class.

4. Click **Submit**. The report results appear based on the parameters you selected. Depending on your specifications, this could take several minutes. The following headers appear in the output file:

Column Name	**Description**
Teacher	Teacher’s name in the format “Lastname, Firstname.”
Course Name	Course name of the section reported on the page.

Expression	Periods and Cycle Days associated for the section reported on the page.
Course Number	Course number of the section reported on the page.
Section Number	Section number of the section reported on the page.

Each row represents a record for the student for the section. The table below describes each column in the output file:

Column Name	**Description**
Day	Day of the week.
Date	Date.
Expression	Period and cycle day.
Student	Student's name in the format "Lastname, Firstname."
Teacher Signature	School number associated with the enrollment record. Because this is a report for a school, it will always be the current school.
Date	School name abbreviation associated with the enrollment record. Because this is a report for a school, it will always be the current school.

5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Attendance Count and Audit Reports

Use the Attendance Count and Attendance Audit reports to display instances of certain attendance codes for a student, group of students, or class. For other attendance-related reports, see *Attendance Reports*.

To indicate a selection of students when running a report, select that group of students before running the reports. If you select a group of students from the start page, the Group Functions page appears either immediately or after selecting students from the Student Selection page.

For more information about attendance, see *Attendance Overview*.

- Attendance Count
- Class Attendance Audit
- Attendance Summary by Grade
- Student Attendance Audit
- Year-to-Date Attendance Summary

Attendance Count Report

Use the Attendance Count report to generate multi-day period-by-period attendance code information.

Note: You can search on any absent or present attendance code that is stored in the database. However, instances where the absence of an attendance code indicates a presence is not searchable as an attendance code value is not stored in the database.

How to Run the Attendance Count Report

Note: You can also access this report by clicking **Attendance > Attendance Count**.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Attendance Count**. The Attendance Count Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Use Defaults**: Searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate

	students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: Searches for and displays report output by day. • **Meeting**: Searches for and displays report output by period. • **Interval**: Searches for and displays report output by interval. • **Time**: Searches for and displays report output by time. • **Time/Interval**: Searches for and displays report output by time and interval. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration.
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • **The selected students only** to run the report for students in the current selection enrolled in the specified date range. • **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the “Students to Include” section and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the “Students to Include” selection.
Attendance Codes	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or

	CONTROL (Windows) as you click each of the attendance codes you want to scan.
Begin Date and Ending Date	Enter the beginning and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Periods	Select the checkboxes of the periods you want to scan or leave all the checkboxes blank to scan all periods.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu,

	choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Include Dropped Classes	Select the checkbox to report on attendance for dropped classes.
Minimum Number of Occurrences	Enter the minimum number of occurrences of the code to include in the scan.
Itemize by Day	Select the checkbox to further parse the scan by cycle days selected. **Note:** This checkbox appears only for schools with multi-day schedules.
Include Student Number	Select the checkbox to include the student numbers on the report.
Number of Blank Lines Below Student Names	Enter the number of blank lines to include as separators after each student name.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Do any of the following:
    - Click **Functions** at the bottom of the report to open the Group Functions page. For more information about what you can do from that page, see *Work with Groups*.
    - Click **Find** to identify teachers who have not yet taken attendance. For more information, see *How to Run the PowerTeacher Attendance Report*.
    - Print or save the report. For more information, see *Run, Print, and Save Reports*.

Class Attendance Audit Report

Use the Class Attendance Audit report to generate section-specific attendance roster.

How to Run the Class Attendance Audit Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Class Attendance Audit**. The Class Attendance Audit Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Teachers	Select the teachers for which you want to scan or select **ALL TEACHERS**. To select multiple teachers, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the teachers you want to scan. **Note:** For a staff member to appear in this list, the Staff Status field (accessible via Start Page > Staff > Select A Staff Member > Edit Information) must be set to **Teacher** and **Current**.
Periods	Select the checkboxes of the periods you want to scan or leave all the checkboxes blank to scan all periods.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background.

	• **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be Filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Vocational Classes Only	Select the checkbox to limit the audit to just vocational classes.
Include Student Number	Select the checkbox to include the student numbers on the report.
Header Label 1	To include sections and courses table data in the header of this report, enter the text you want to appear on the report.
Field 1	If you entered text in the Header Label 1 field, enter the code needed to pull the data from the sections and courses table.
Header Label 2	See Header Label 1.

Field 2	See Field 1.
Include Term Name	Select the checkbox to display the selected term in the header of the report, such as **Term: 2009-2010**.
Break to a new page for each	Use the pop-up menu to indicate how you want page breaks to be applied. **Note:** Do not run this report for reporting segments if segments are longer than 20 school days. Also, you must have the Reporting Segments option selected above when using this option.
Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Page Orientation	Choose the page layout from the pop-up menu. Portrait is a vertical page; landscape is a horizontal page.
Scale	Scale is the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes.
5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

   Note: Asterisks (*) appear for days that are off-track for students.

Attendance Summary by Grade Report

Use the Attendance Summary by Grade report to generate aggregated attendance information for a date range and grades.

How to Run the Attendance Summary by Grade Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Attendance Summary by Grade**. The Attendance Summary by Grade Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select the attendance recording method for which you want to run this report. • **Use Defaults**: Searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: Searches for and displays report output by day. • **Meeting**: Searches for and displays report output by period. • **Interval**: Searches for and displays report output by interval. • **Time**: Searches for and displays report output by time. • **Time/Interval**: Searches for and displays report output by time and interval. **Note:** Menu options appear based on your attendance setup configuration. For more information about attendance modes, see *Attendance Overview*.
Attendance Conversion	Use the pop-up menu to select the method by which attendance is calculated for which you want to run this report. Menu options appear based on the Attendance Mode selected. • If the Attendance Mode of **Use Defaults** was selected, **Use Defaults** appears by default. There are no other menu options to choose from.

	• If the Attendance Mode of **Daily** was selected, choose either **Code to Day**, **Percent Time to Day**, or **Time to Day**. If the Attendance Mode of **Meeting** was selected, choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. • If the Attendance Mode of **Interval** was selected, only the **Time to Day** conversion can be selected. • If the Attendance Mode of **Time** was selected, only the **Time to Day** conversion can be selected. • If the Attendance Mode of **Time/Interval** was selected, only the **Time to Day** conversion can be selected. **Note:** For more information about attendance conversions, see *Attendance Overview*.
Grades	Select the checkboxes of the grade levels you want to scan. Alternatively, leave all the checkboxes blank to scan all grade levels.
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Special Programs	Select the checkboxes for the programs to scan. **Note:** When one or more special programs are selected, the report produces one table listing students who are not in the selected special programs and a table for each selected special program listing those students who are in the selected special program.

Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Report by Track	Indicate whether you want to filter the report by tracks.
Tracks	If you selected **Yes** for Report by Track but no track is entered, the report includes only students with a blank track. To include only students in specific tracks, do not include a leading comma in the list of tracks, for example, **A,B,C.** To include both students that have both blank and defined tracks, enter a leading comma in the list of tracks, for example, **,A,B,C**.

	If you selected **No** for the Report by Track, the tracks entered will be ignored.
Check for possible conflicts	Click to check for possible track errors.
Display Audit Table	Select the checkbox to display the audit table, which includes the last grade and special program information.

4. Click **Submit**. The report results appear based on the parameters you selected. Depending on your specifications, this could take several minutes. The following information appears in the output file when no special programs are selected in the report parameters:

Column Name	Description
Grade Level	The grade levels for which the report was generated.
Carry Forwards	The number of students that were enrolled prior to the reporting period.
Gain	The number of students that enrolled during the reporting period.
Multiple gain	The number of students that had multiple enrollments during the reporting period, such as enrolled, withdrew, or re-enrolled.
Loss	The number of students that withdrew/transferred during the reporting period.
Ending	The number of students enrolled on the last day of the reporting period.
Actual Days	Total number of students enrolled days in the reporting period.

OffTrack	Number of days students were off track during the reporting period.
Days N/E	Total number of days students were not enrolled during the reporting period.
Days Absent	Total number of days students were absent during the reporting period.
Days Attd	Total number of days of school attended by students during the reporting period.
ADA	Average daily attendance during the reporting period.
ADA %	Average daily attendance percentage during the reporting period.

The following information appears in the output file when one or more special programs are selected in the report parameters. Additionally, a summary table displays **students not in** the selected special programs:

Column Name	Description
Grade Level	The grade levels for which the report was generated.
Carry Forwards	The number of students that were enrolled prior to the reporting period and not enrolled in any of the checked special programs.
Gain	The number of students that enrolled during the reporting period and not enrolled in any of the checked special program.
Multiple gain	The number of students that had multiple enrollments during the reporting period, such as enrolled, withdrew, or re-enrolled.
Loss	The number of students that withdrew/transferred during the reporting period and the number of students that enrolled into any of the checked special programs.

Ending	The number of students enrolled on the last day of the reporting period.
Actual Days	Total number of students enrolled days in the reporting period while not in any of the checked special programs.
OffTrack	Number of days students were off track during the reporting period.
Days N/E	Total number of days students were not enrolled during the reporting period.
Days Absent	Total number of days students were absent during the reporting period.
Days Attd	Total number of days of school attended by students, during the reporting period while not in any of the checked special programs.
ADA	Average daily attendance during the reporting period.
ADA %	Average daily attendance percentage during the reporting period.

The following information appears in the output file when one or more special programs are selected in the report parameters. Additionally, a summary table displays for **only students in** each of the selected special programs:

Column Name	**Description**
Grade Level	The grade levels for which the report was generated.
Carry Forwards	The number of students that were enrolled in the special program prior to the reporting period.
Gain	The number of students that enrolled in the special program during the reporting period.

Multiple gain	The number of students that had multiple enrollments in the special program during the reporting period, such as enrolled, withdrew, or re-enrolled.
Loss	The number of students that withdrew/transferred from the special program during the reporting period.
Ending	The number of students enrolled in the special program on the last day of the reporting period.
Actual Days	Total number of students enrolled days in the special program in the reporting period.
OffTrack	Number of days students were off track during the reporting period.
Days N/E	Total number of days students were not enrolled in the special program during the reporting period.
Days Absent	Total number of days students were absent during the reporting period.
Days Attd	Total number of days of school attended by students during the reporting period while enrolled in the special program.
ADA	Average daily attendance during the reporting period.
ADA %	Average daily attendance percentage during the reporting period.

The following information appears in the output file when the Display Audit Table field is set to Yes:

Column Name	**Description**
[Blank]	The index for the row.

Student	The Last Name, First Name of the student.
Carry Fwd	An X appears if the student was already enrolled prior to the reporting period.
Month/Day Cycle Day	The grade level of the student on each date within the reporting period. **SP** also appears if the student is enrolled in any of the special programs checked in the parameters.
Gain	The number of times the student enrolled/re-enrolled in the reporting period.
Loss	The number of times the student withdrew/transferred from the special program during the reporting period.
Mem	The number of membership days for the student during the reporting period.
Att	The total attendance for the student during the reporting period.
N/E	The total number of not enrolled days for the student during the reporting period.

5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*. To generate a roster detailing attendance by day and the average daily attendance and average daily membership by date range, see *How to Run the Student Attendance Audit Report*.

Student Attendance Audit Report

Use the Student Attendance Audit report to generate a roster detailing attendance by day and the average daily attendance and average daily membership by date range.

How to Run the Student Attendance Audit Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.

2. On the System tab, click **Student Attendance Audit**. The Student Daily Attendance Audit Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Use Default**: searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: searches for and displays report output by day. • **Meeting**: searches for and displays report output by period. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration. For the Use Default menu option to appear, FTEs must be set up and the “Use default settings” checkbox on the Attendance Preferences page must be selected. For the Daily or Meeting menu options to appear, the Daily or Meeting checkboxes on the Attendance Preferences page must be selected.
Attendance Conversion	Use the pop-up menu to select the method by which attendance is calculated for which you want to run this report. Menu options appear based on the Attendance Mode selected. • If the Attendance Mode of **Use Defaults** was selected, **Use Defaults** appears by default. There are no other menu options to choose from.

	• If the Attendance Mode of **Daily** was selected, choose either **Code to Day**, **Percent Time to Day**, or **Time to Day**. If the Attendance Mode of **Meeting** was selected, choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. For more information about attendance conversions, see *Attendance Overview*.
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • **The selected students only** to run the report for students in the current selection enrolled in the specified date range. • **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the “Students to Include” section and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the “Students to Include” selection.
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

	Note: The date entered must fall within the selected school year term.
Processing Options	Select a time to run the report: • **In Background Now** to execute the report immediately in the background. • **ASAP** to execute the report in the order it is received in the Report Queue. • **At Night** to execute the report during the next evening. • **On Weekend** to execute the report during the next weekend. • **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.
Data to be Filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Include Student Number	Select the checkbox to include the student numbers on the report.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes. The following information appears in the output file:

Column Name	Description
Index	Counter indicating the number of records that appear in the report.
Student Name	The name of the student.
Student Number	The student's identification number.
Day	A column for each day in the date range appears. Each day displays the student's attendance value for that day, a numeric value, usually from 0 to 1.
ADA	Average daily attendance.
ADM	Average daily membership
Grand Total	The total attendance for each day for each student.

5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Year-to-Date Attendance Summary Report

Use the Year-to-Date Attendance Summary report to generate year-to-date aggregated attendance information by grade. This report is aggregated by grade, data sectioned out by reporting segments. The report queries the selected reporting segment as well as all those reporting segments with end dates less than the start date of the selected segment.

Note: In order for this report to work properly, you must have the reporting segments set up correctly. For more information, see *Reporting Segments*.

How to Run the Year-to-Date Attendance Summary Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.

2. On the System tab, click **Year-to-Date Attendance Summary**. The Year to Date Attendance Summary Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. • **Use Default**: Searches for and displays report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • **Daily**: Searches for and displays report output by day. • **Meeting**: Searches for and displays report output by period. For more information about attendance modes, see *Attendance Overview*. **Note:** Menu options appear based on your attendance setup configuration. For the Use Default menu option to display, FTEs must be set up and the “Use default settings” checkbox on the Attendance Preferences page must be selected. For the Daily or Meeting menu options to display, the Daily or Meeting checkboxes on the Attendance Preferences page must be selected.
Attendance Conversion	Use the pop-up menu to select the method by which attendance is calculated for which you want to run this report. Menu options appear based on the Attendance Mode selected. • If the Attendance Mode of **Use Defaults** was selected, **Use Defaults** appears by default. There are no other menu options to choose from. • If the Attendance Mode of **Daily** was selected, choose either **Code to Day** or **Time to Day**.

	• If the Attendance Mode of **Meeting** was selected, choose **Period to Day** or **Time to Day**. For more information about attendance conversions, see *Attendance Overview*.
Grades	Select the checkboxes of the grade levels you want to scan. Alternatively, leave all the checkboxes blank to scan all grade levels.
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate the hour and minute.

4. Click **Submit**. The report results display based on the parameters you selected. Depending on your specifications, this could take several minutes. The following information appears in the output file:

   Note: The order in which reporting segments appear is based on the reporting segment's sort order. For more information, see *Reporting Segments*.

Column Name	Description
Grade Levels	The grade levels for which the report was generated.
Memb. Days	The total number of membership days by reporting segment.
Day	The total number of in-session school days per segment
ADA	Average daily attendance per segment.

5. Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Aggregate Membership Reports

Aggregate Membership Audit Report

Use the Aggregate Membership Audit report to generate membership audit by section information. This report is similar to a class roster report. It lists the students that were enrolled or ever enrolled in the class/section and their membership.

How to Run the Aggregate Membership Audit Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Aggregate Membership Audit**. The Aggregate Membership Audit Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Lines per page	Enter the number of data rows you want to appear on each page of the report.

Starting Page Number	Enter the page number from which you want the report to start.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Course Number	Enter the course numbers. Separate multiple courses with commas. Use a blank field to scan all courses.
Section Number	Enter the section numbers. Separate multiple sections with commas. Use a blank field to scan all sections.

Term	Select the term for which you want to run the report from the pop-up menu.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

   The following information appears in the output file:

Column Name	Description
Course Name	The name of the course for the section.
Teacher	The name of the teacher teaching the section (Last, First, Middle).
Term	The term the section is being taught. Click **view days** to view the school days in the selected term.
Expression	The section expression.
Section Number	The number of the section.
Student	The name of the student (Last, First, Middle).
Enrolled	The date the student enrolled in the course.
Exited	The date the student exited the course.
Membership Days	The total number of days the student was enrolled in the course.

Total	The total number of days students were enrolled in the course.

Discipline Reports

In addition to the creating customized Log object reports using the Objects reporting tool, you can use the preconfigured Discipline Log and Discipline Summary reports to display discipline information.

Discipline Log Report

Use the Discipline Log report to generate a list of student discipline incidents by date range and sub-type.

How to Run the Discipline Log Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Discipline Log**. The Discipline Log Report page appears. The upper portion of the page displays the report's name, version number, description, and any comments.
3. Use the following table to enter information in the fields:

Field	Description
Use	Select the scope of which discipline logs to report: • **Default** (whichever of the following is set as the default) • **Current School Only** • **District Wide**
Students to Include	Indicate which students you want to run the report for by choosing one of the following options from the pop-up menu: • **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range

	• **All students** to run the report for all students in the current school enrolled in the specified date range
Begin Date and Ending Date	Enter the beginning date and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date range should fall within the current school year.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.

Discipline incident subtype to include	Use the pop-up menu to indicate which log subtypes for which you want to run the report. Select **All Sub-types** to not limit your scan to just one subtype. For more information about log subtypes, see *Log Types*.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Discipline Summary Report

The Discipline Report Summary is a global, aggregated report that breaks down disciplinary incidents by gender, ethnicity, special program, and grade level.

How to Run the Discipline Summary Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Discipline Summary**. The Discipline Summary Report page appears. The upper portion of the page displays the report's name, version number, description, and any comments.
3. Use the following table to enter information in the fields:

Field	**Description**
Students to Include	Indicate which students you want to run the report for by choosing one of the following options from the pop-up menu: • **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range

	• **All students** to run the report for all students in the current school enrolled in the specified date range
Reporting Segment or Begin Date and Ending Date	Choose the applicable reporting segments or enter the date range to scan using the format mm/dd/yyyy.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.

Discipline incident subtype to include	Choose the appropriate discipline subtype from the selection menu.
Sort Summary By	Choose one of the following sort options: • **Grade Level** • **Ethnicity** • **Special Program**

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Enrollment Reports

When running enrollment reports, you can screen for students in special programs. If the students are in the selected program at any time during the specified period, they are included in the report results. For each report, you can check for possible conflicts to display any students with errors on their class enrollment dates.

Class Size Reduction Report

The Class Size Reduction report provides a day-to-day count of section enrollment over a specified period. When setting up the report, you can exclude students in a special program from the enrollment count. At least one course number must be entered to run the report. To display detailed enrollment per section, see *How to Run the Enrollment by Section Report*.

How to Run the Class Size Reduction Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.

2. On the System tab, click **Class Size Reduction Report**. The Class Size Reduction Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date must fall within the selected school year term.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.

Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Exclude counts for students enrolled in this Special Program	Use the pop-up menu to indicate any special program you want to exclude from being counted. Students will not be included in the class size counts for each day that they are enrolled in the specified special program.
Sort By	Select the sort order: • **Course Number** • **Teacher Name**
Include only these Course Numbers	Enter the course numbers. Separate multiple courses with commas.
Include/Exclude Section Numbers	Select whether you want to exclude or include any sections.
Section Numbers	Enter the section numbers to be included or excluded. Separate multiple sections with commas. Use a blank field to scan all sections.
Check for possible conflicts	Click to display any students with errors on their class enrollment dates.

The report will break to a new page for each	Use the pop-up menu to indicate whether you want to break the report across pages by **Month** or **Reporting Segment**.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

   The following information appears in the output file:

Column Name	Description
[Blank]	Row counter.
Teacher	The teacher's name in last, first format.
Course	The course number for the class.
Section	The section number for the class.
Grade	The grade level associated with the section.
[Month, Cycle Day, Day of Week, Day of Month]	Each column represents an in session day in the school calendar. The number is the size of the class on each date.
Avg	The average class size for the entire date range of the report. **Note:** This column only appears after the very last date in the report date range. It may not appear on each page, especially if the option to have a page break for each month is selected.

Enrollment by Grade Report

Use the Enrollment by Grade report to generate a summary of accumulated student enrollment by grade level.

How to Run the Enrollment by Grade Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Enrollment by Grade**. The Enrollment by Grade Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
School	The selected school appears.
Reporting segment	Use the pop-up menu to choose the reporting segment. For more information about reporting segments or to create a reporting segment, see *Reporting Segments*.
Grades	Select the checkboxes of the grade levels you want to scan or leave all the checkboxes blank to scan all grade levels.
Special Programs	Select the checkboxes of the special programs you want to exclude or leave all the checkboxes blank to include students in all special programs.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Enrollment by Section Report

This report provides current year enrollment statistics for class sections. To report on class size, see *How to Run the Class Size Reduction Report*.

How to Run the Enrollment by Section Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Enrollment by Section**. The Enrollment by Section page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Reporting Segment or Begin Date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date must fall within the selected school year term.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend.

	• Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Sort By	Select the sort order: • **Course** • **Teacher**
Course Numbers	Enter the course numbers. Separate multiple courses with commas.
Include/Exclude Section Numbers	Select the option to exclude or include any sections.
Section Numbers	Enter the section numbers to be included or excluded. Separate multiple sections with commas. Use a blank field to scan all sections.
Check for possible conflicts	Click to display any students with errors on their class enrollment dates.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

   The following information appears in the output file:

Column Name	Description
Teacher	The name of the teacher teaching the section (Last, First, Middle).
Course Name	The name of the course for the section.
Section Number	The number of the section.
Grade	The grade level associated with the current section.
Begin Enrollment	The student enrollment in the section as of the start date of the reporting period.
Entries	How many students were added to the section. **Note:** If a student enters the same section twice, it will count as two entries.
Withdrawals	How many students were withdrawn from a section. **Note:** If a student enters the same section twice, it will count as two entries.
End Enrollment	The enrollment at the end of the reporting period.
Enrollment For Period	The total number of enrollments for the reporting period.

Enrollment To Date	The current enrollment as of today.
Aggregate Days Attended	The number of days attended by all of the students enrolled in the section during the date range.
Average Days Attended	The average daily attendance (the number of days in the date range divided by the Aggregate Days Attended).
Days Absent	The number of days absent for the section during the reporting period.
Days Off Track	The number of off track days for the students enrolled in the section during the reporting period.
Total Days not Enrolled	The number of days students are not enrolled in this section; that is, students who are enrolled at some point during the year but are not enrolled one or more days during the reporting period.
Aggregate Days Belonging (Membership)	The total membership for this section during the reporting period.
Average Number Belonging (ADM)	The Average Daily Membership for this section during the reporting period (Aggregate Days Belonging divided by the number of meeting days in the reporting period).
Attendance Percent	The percent of actual attendance out of the total potential attendance for the reporting period (Aggregate Days Attended divided by the Average Number Belonging).

Enrollment Summary by Date Report

This report is essentially the same as the Enrollment Summary except for the subtle difference in the order and options by which you generate the report. For further information, see *Enrollment Summary*.

Section Enrollment Audit Report

Use the Section Enrollment Audit report to detect possible section enrollment errors, such as a student who is enrolled in school but not in any classes.

How to Run the Section Enrollment Audit Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Section Enrollment Audit**. The Possible Conflicts for Section Enrollment Audit page displays any section enrollment errors.

School Enrollment Audit Report

Use the School Enrollment Audit report to detect possible school enrollment errors.

How to Run the School Enrollment Audit Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **School Enrollment Audit**. The Possible Conflicts for School Enrollment Audit page displays any student enrollment errors.

Vocational Courses Aggregate Membership Report

Use the Vocational Courses Aggregate Membership report to generate a list of vocational sections and their current membership totals.

How to Run the Vocational Courses Aggregate Membership Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Voc. Courses Agg. Membership**. The Vocational Courses Aggregate Membership Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Lines per page	Enter the number of data rows you want to appear on each page of the report.

Starting Page Number	Enter the page number on which you want the report to start.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The resulting report displays the schedule of vocational courses and the number of students in each class. It also displays the number of membership days for the different classes. Proceed by doing one of the following:

   - Click a number of aggregate membership days to view an audit page.
   - Click an underlined number in the Size column to view the list of students in the class.
   - Click a section number to view a description of the section.

- Print the report from your Web browser or save it to another application. For more information, see *Run, Print, and Save Reports*.

Enrollment Summary

The Enrollment Summary report can be run from the district level, as well as the school level. Depending on which mode you run the report, the resulting report displays a breakdown of students for the entire district or school. If running the report at the district level, the Enrollment Summary page displays student Scheduling/Reporting Ethnicity data. If running the report at the school level, the Enrollment Summary page provides you with student Scheduling/Reporting Ethnicity data, as well as student Federal Ethnicity and Race data.

How to Navigate to the Enrollment Summary from the Start Page

If running the report at the district level, data is calculated for all active students for today's date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

On the start page, choose **Enrollment Summary**. The Enrollment Summary page appears.

How to Navigate to the Enrollment Summary from the Student Selection Page

If running the report at the district level, data is calculated for your student selection for today's date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Enrollment Summary**. The Enrollment Summary page appears.

How to Navigate to the Enrollment Summary from the Group Functions Page

If running the report at the district level, data is calculated for your student selection for today's date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
3. Click **Group Functions**. The Group Functions page appears.
4. Under Enrollment, click **Enrollment Summary**. The Enrollment Summary page appears.

How to Navigate to the Enrollment Summary from the Reports Page

If running the report at the district level, data is calculated for all active students for a selected date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Enrollment Summary by Date**. The Enrollment Summary by Date page appears.
3. Use the following table to enter information in the fields:

Field	Description
Calculate enrollments as of	Enter the date for which you want to calculate enrollments.
Report Output Locale	Use the pop-up menu to choose which language you want the report output to display.

4. Click **Submit**. The Enrollment Summary page appears.

How to View the Enrollment Summary

1. Navigate to the Enrollment Summary page. The Enrollment Summary page appears.

   Note: If running the report at the district level, skip to the Scheduling/Reporting Ethnicity table.

2. Use the following table to enter information in the fields:

Field	Description
View	Do one of the following: • Choose **Scheduling/Reporting Ethnicity** to view student ethnicity data that is used in scheduling and preconfigured reporting. • Choose **Federal Race and Ethnicity** to view displays aggregate student data as required by the Federal Ethnicity and Race Categories from the U.S. Department of Education.
Students	Indicate which students you want to calculate enrollment by selecting one of the following options: • Select **All Active Enrollments** to run the report for all students in the current school. • Select **Current Selection** to run the report for students in the current selection.
Date	Enter the date for which you want to calculate enrollments or click the **Calendar** icon to select a date. **Note:** If you selected **Current Selection** for students, this field appears shaded as it is not applicable.

If you selected Scheduling/Reporting Ethnicity, the following information appears in the Results section:

Note: Column and row headings provide links to charts that display ethnicity information in an easy-to-read animated chart. Click a column or row heading to view enrollment by ethnicity in specific grades, overall ethnicity enrollment by grade, or total enrollment by ethnicity. Click any bar within a chart to view additional information.

Note: Totals include total enrollment of male and female students (light blue), total male students (dark blue), and total female students (pink). Totals appear as links. Click a total to view the list of students associated to that total.

Field	Description
Grade Level	The grade levels for the selected school. **Note:** Only grade levels used by the district/school appear in the report.
Total in Grade	The total number for each grade level.
[Ethnicity and Race Categories]	The total number for each ethnicity or race.

If you selected Federal Ethnicity and Race, the following information appears in the Results section:

Note: Totals include total enrollment of male and female students (light blue), total male students (dark blue), and total female students (pink). Students are only calculated once and appear in the appropriate column based on their Federal Race and Ethnicity settings on the Demographics page. Totals appear as links. Click a total to view the list of students associated to that total.

Field	Description
Grade Level	The grade levels for the selected school. **Note:** Only grade levels used by the district/school appear in the report.
Total in Grade	The total number for each grade level.
[Race Categories]	The total number for each race category appears. **Note:** If **No** was selected for **Ethnicity** or if it was undefined and race codes that apply to only one race category were selected, then the student is calculated in the appropriate race category column.
Hispanic or Latino	The total number for each race category appears.

	Note: If **Yes** was selected for **Ethnicity**, then the student is calculated in this column. This setting takes precedence over all other race settings.
Two or More Race Categories	The total number of students who are associated to two or more race categories appear. **Note:** If **No** was selected for **Ethnicity** or if it was undefined and race codes that apply to two race categories were selected, then the student is calculated in this column.
Unspecified	The total number of students who have not specified a race category or ethnicity appear.

Grade and Gradebook Reports

Use gradebook reports to determine the class rank or the number of students in a class that received a specified grade.

Class Ranking Report

This report provides the class rankings at your school so that you can determine the top students for each class level.

How to Run the Class Ranking Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Class Ranking**. The Class Ranking Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
Grade Level	Choose the grade level to scan from the pop-up menu.
Class Rank Method	Choose from the pop-up menu the GPA calculation method to use for the class ranking.

Display GPAs	To scan only a range of GPAs, enter the range in the fields.
Display Percentiles	To scan a range of grade percentiles, enter the range in the fields.

4. Click **Submit**. The Class Ranking Report displays the rank number, student number, student name, grade point average, and class rank percentile for each student.

   Proceed by printing the report from your Web browser or saving it to another application. For more information, see *Run, Print, and Save Reports*.

Grade Count By Teacher Report

Like the Grade Count report, the Grade Count By Teacher report also displays how many times each letter grade occurred for the group during current or past terms. The only difference is that this report restricts the results to a single teacher.

How to Run the Grade Count By Teacher Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **by Teacher** next to Grade Count. The Grade Count page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Scan by student	Select an option to scan either the selected students or all currently enrolled students.
Scan by teacher	Choose the teacher to scan from the pop-up menu. **Note:** For a staff member to appear in this pop-up menu, the Staff Status field (accessible via Start Page > Staff > Select A Staff Member > Edit Information) must be set to **Teacher**.
Scan	Select an option to indicate which grades to scan: • **current grades**

	• **historical grades** (If you select this option, enter the store code for which you want to scan, such as **Q2**)

4. Click **Submit**. The resulting report lists the letter grades and how many times each grade occurs in the specified group for the chosen term and teacher.

   Proceed by printing the report from your Web browser or saving it to another application. For more information, see *Run, Print, and Save Reports*.

Grade Count Report

This report displays how many times each letter grade occurred for the selected group during current or past terms.

How to Run the Grade Count Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Grade Count**. The Grade Count page appears, and the number of selected students appears in the Students To Scan field.
3. Select an option to indicate which grades to scan:
   - **current grades**
   - **historical grades** (If you select this option, enter the store code for which you want to scan, such as **Q2**)
4. Click **Submit**. The resulting report lists the letter grades and how many times they occur in the specified group for the chosen term.

   Proceed by printing the report from your Web browser or saving it to another application. For more information, see *Run, Print, and Save Reports*.

Grades Distribution Report

The Grades Distribution report identifies trends in instruction, grading and assessment. The report helps determine the validity and consistency of grading practices within the school.

How to Run the Grades Distribution Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Grades Distribution**. The Grades Distribution Report page appears. The upper portion of the page displays the report's name, version number, description, and any comments.
3. Use the following table to enter information in the fields:

Field	Description
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Report By	From the pop-up menu, choose whether to run an overview report or to run the report by course, teacher, department, credit type, or student.
Grades to Scan	From the pop-up menu, choose whether to scan current grades or historical grades.

Distribute Grades By	From the pop-up menu, choose whether to distribute grades by letter grade or percentages.
Distribution Display	Determine the headings that appear at the top of each view. For example, enter **A, B, C, D, F** or **60, 70, 80** in the text box to facilitate distributing the grades or percentages. All scores that do not fall into a letter grade or percentage range will go into a column named Other.
Cutoff Percent for Pass/Fail	If distributing grades by percentages, enter a percent to determine the difference between a passing grade and a failing grade. For example, enter **65** in this box, and any percentage 64 or below displays as a failing grade.
Passing Grades	If distributing grades by letter grades, enter all letter grades that comprise a passing score, such as **A**,**B**,**C**,**D**.
Failing Grades	If distributing grades by letter grades, enter all letter grades that comprise a failing score, such as **F**.
Term	If distributing grades by historical grades, choose from the pop-up menu the term for distributing historical grade information.
Store Codes	If distributing grades by historical grades, enter the applicable store code for the historical grade.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Graduation Progress Report

This report provides the graduation progress of the selected students.

How to Run the Graduation Progress Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Graduation Progress Report (PDF)**. The Graduation Progress Report page appears.
3. Select which students to include in the report:
    - **All students**
    - **The selected [x] students only**
    - **Only these grade levels** (enter the grade levels in the blank field, separated by commas)
4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

    Note: Click **Refresh** to update the status of the report.

    The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Honor Roll Report

This report provides honor roll calculations for a group of students. The report displays all honor rolls the students have received, even if the honor roll was received in another school.

How to Run the Honor Roll Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Honor Roll**. The Honor Roll Report page appears.
3. Use the following table to enter information in the fields:

Field	Description
Which Students	Select the option to identify the students for whom you want to calculate honor roll information:

	• **[selected student]** • **The selected [x] students only** • **All [x] currently enrolled students**
Report Title	Enter the name for this honor roll report.
Honor Roll Method	Choose the honor roll method you want to calculate from the pop-up menu. Specify a single honor roll method or all honor roll methods.
Store Code	Enter the store code for which you want to run the report. Leave this field blank to list all store codes.
School Year	Enter the school year for which you want to run the report. Only honor roll records stored during the single school year specified will be listed. Leave this field blank to list only records from the current school year.
Historical Grade Level	Enter the grade level for which you want to run the report. Only honor roll records the student earned while at the single grade level specified will be listed. Leave this field blank to list all grade levels.

4. Click **Submit**. The Honor Roll report displays the report title and the following information:
    - Student name (click to view the student pages for that student)
    - Student number
    - Grade level
    - Honors level
    - Grade point average

Teacher Gradebooks Reports

This report prints assignment information from teachers' PowerTeacher data files for the specified period.

How to Run Teacher Gradebooks Reports

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Teacher Gradebooks**. The Teacher Gradebooks page appears.
3. Use the following table to enter information in the fields:

Field	Description
Print Gradebooks for	Select the teacher whose attendance records you want to scan. Press and hold COMMAND (Mac) or CONTROL (Windows) to select multiple teachers. **Note:** For a staff member to appear in this list, the Staff Status field, which is accessible via Start Page > Staff > Select A Staff Member > Edit Information, must be set to **Teacher**.
For classes during this term	The selected term appears.
Meetings	Select the checkboxes to indicate the meetings to be scanned.
Don't print classes that	Select the checkboxes to exclude classes that have no students or have no assignments. You can also select both or neither of the checkboxes.
Only assignments in this Date Range	To limit the report to assignments within a specific date range, select the checkbox and enter the date range in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Assignment header	Select the content to include in the header for the assignments: • **Print Assignment Name and Date Due** • **Print Assignment Key**

Print in name column	Select the content to include in the column for students: • **Student Name** • **Student Number**
Print Final Grades	Enter final grades to print (optional). If you enter grades, select either the **Letter Grade**, **Percent**, or both checkboxes to determine how the final grades appear.
Print which assignment score?	Select an option to determine how assignment scores appear: • Point Value • Percent • Letter Grade
Scores Listing Font	Choose the scores listing font from the pop-up menu.
Scores Listing Style	Enter the scores listing font size and line height in points. **Note:** One point equals 1/72 of an inch. Select the formatting checkboxes you want to use. For example, select the Bold checkbox to bold the scores listing.
Horizontal Cell Padding	Enter the amount of space from the sides of the cells to the text in points. **Note:** One point equals 1/72 of an inch.
Student Name Column Width	Enter the width of the student name column in inches.
Assignment Column Width	Enter the width of the assignment column in inches.
Background row shading	Enter a percentage to determine the shade of the rows.

Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Enter the size of the margins in inches.
Orientation, Scale	Choose the page layout from the pop-up menu. **Portrait** is a vertical page, and **Landscape** is a horizontal page. Scale is the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.
Watermark text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose Custom and enter the text you want to print as a watermark in the field.
Watermark mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	To run this report, select a time to start it: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

The report displays assignments and grades for the selected dates in the selected classes. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Membership Reports

The membership reports use daily attendance to generate average daily attendance and average daily membership numbers that depend on the number of days a student has attended. These reports can be run in either Meeting or Daily mode.

Depending on the mode, there are two conversions that can be applied to the report. For Meeting mode, select either “Period to Day” or “Time to Day” attendance conversion. The “Period to Day” option uses the Period Items conversion, and the “Time to Day” option uses the Time Items conversion. For Daily mode, select either “Code to Day” or “Time to Day” attendance conversion. The “Code to Day” option uses the Code Items conversion, and the “Time to Day” option uses the Time Items conversion. For more information, see *Attendance Conversions*.

To perform a membership audit by section, see *How to Run the Aggregate Membership Audit Report*.

ADM/ADA by Date Report

The ADM/ADA by Date report produces membership and attendance information by date for selected students. This report uses the attendance codes and minutes entered into PowerSchool under the student's daily attendance information. The report then sums the total membership for a date and the total number of students attending, with a final average for the number of students having membership and attending for a given date range.

How to Run the ADM/ADA by Date Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **ADM/ADA by Date**. The ADA/ADM by Date Report page appears. The upper portion of the page displays the report's name, version number, description, and any comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select the attendance recording method for which you want to run this report. **Note:** Menu options appear based on your attendance setup configuration. For more information about attendance modes, see *Attendance Overview*. • Choose **Use Defaults** to search for and display report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • Choose **Daily** to search for and display report output by day. • Choose **Meeting** to search for and display report output by period. • Choose **Interval** to search for and display report output by interval. • Choose **Time** to search for and display report output by time. • Choose **Time/Interval** to search for and display report output by time and interval.
Attendance Conversion	Use the pop-up menu to select the method by which attendance is calculated for which you want to run this report. Menu options appear based on the Attendance Mode selected. • If the Attendance Mode of **Use Defaults** was selected, **Use Defaults** displays by default. There are no other menu options to choose from. • If the Attendance Mode of **Daily** was selected, choose either **Code to Day**, **Percent Time to Day**, or **Time to Day**. If the Attendance Mode of **Meeting** was selected, choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**.

	- If the Attendance Mode of **Interval** was selected, only the **Time to Day** conversion can be selected. - If the Attendance Mode of **Time** was selected, only the **Time to Day** conversion can be selected. - If the Attendance Mode of **Time/Interval** was selected, only the **Time to Day** conversion can be selected. **Note:** For more information about attendance conversions, see *Attendance Overview*.
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: - Select **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range. Click the number to display the list of selected students. - Select **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so narrows the selection of students in the "Students to Include" field to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students in the Students to Include field.
Begin Date and Ending Date	Enter the beginning and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Processing Options	Select a time to run the report:

	- Choose **In Background Now** to execute the report immediately in the background. - Choose **ASAP** to execute the report in the order it is received in the Report Queue. - Choose **At Night** to execute the report during the next evening. - Choose **On Weekend** to execute the report during the next weekend. - Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected On Specific Date/Time in the Processing Options field, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

ADM/ADA by Minute Report

The ADA/ADM by Minute report displays the total number of potential minutes for students, total number of minutes missed, total number of minutes attended, and total percentage of each. When in Meeting mode, the system calculates the number of minutes the group of students has attended by period. When in Daily mode, the system displays the number of minutes the group of students has attended by day.

How to Run the ADM/ADA by Minute Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **ADM/ADA by Minute**. The ADA/ADM by Minute Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select the attendance recording method for which you want to run this report. **Note:** Menu options appear based on your attendance setup configuration. For more information about attendance modes, see *Attendance Overview*. • Choose **Daily** to search for and display report output by day. • Choose **Meeting** to search for and display report output by period.
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • Select **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range. Click the number to display the list of selected students. • Select **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the “Students to Include” field and narrows the selection to include only those students having the same grade level as those selected.

	Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the “Students to Include” field.
Begin Date and Ending Date	Enter the beginning and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields. After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

The table below describes each column in the output file when running the report for Meeting attendance mode. Each row in the report represents a period in the school bell schedule.

Column Name	**Description**
Period	The meeting period number.
Total Potential	Two numbers appear for the total potential absences: • Total number of periods in the selected students' bell schedules in the specified date range. • Total number of minutes in the selected students' bell schedules in the specified date range.
Total Absences	Two numbers appear for the total absences: • Number of periods when the selected students were absent. • Number of minutes when the selected students were absent.
Total Absences %	Two numbers appear for the total percentage of absences in relation to potential absences: • Percentage of periods when the selected students were absent. • Percentage of minutes when the selected students were absent.
Total Attended	Two numbers appear for the total attendance:

	• Number of periods when the selected students were present. • Number of minutes when the selected students were present.
Total Attended %	Two numbers appear for the total attendance by percentage: • Percentage of periods when the selected students were present. • Percentage of minutes when the selected students were present.

The table below describes each column in the output when running the report for Daily attendance mode. This report displays only one row.

Column Name	Description
Total Potential	Total number of minutes in the selected students' full day bell schedules in the specified date range. **Note:** The calculation uses the number of minutes specified for the bell schedule item that represents the Meeting and Daily attendance bridge.
Total Absences	Number of minutes when the selected students were absent.
Total Absences %	Percentage of minutes when the selected students were absent.
Total Attended	Number of minutes when the selected students were present.
Total Attended %	Percentage of minutes when the selected students were present.

ADM/ADA by Student Report

The ADM/ADA by Student report generates membership and attendance information per student. This report uses the attendance codes or minutes entered into PowerSchool. The report then sums the total membership and attendance for each student for the given timeframe, with a final average for the number of students having membership and attending for a given date range.

To avoid slow processing time while running the ADA/ADM by Student report, please check the following:

- If the reporting date range spans the entire year, try running the report for a smaller date range.
- Check the selected grade levels when running this report. Instead of running the report for all grade levels, run the report only for those grade levels you would like to report on.
- If you intend to run the report for a selection of students, ensure prior to executing the report that your report parameters are set to run for the current selection instead of all students.
- When starting the report, choose to run the report ASAP instead of in the background.
- Check the reporting queue for other jobs that are currently running. When multiple reporting jobs are running, all reports may run slower. Run the ADA/ADM by Student report when fewer users are processing reports.
- Check the report queue for reports that are not responding. Often, these reports can prevent any other report from completing.

How to Run the ADM/ADA by Student Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **ADM/ADA by Student**. The ADA/ADM by Student Report pages appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select one the attendance recording methods for which you want to run this report. **Note:** Menu options appear based on your attendance setup configuration. For more information about attendance modes, see *Attendance Overview*.

	• Choose **Use Defaults** to search for and display report output based on FTE. By default, this menu option is selected. If your school uses more than one FTE to differentiate students, such as full time and part time, and you want to run the report for those sets of students, the only way to effectively run these groupings with different modes and conversion items is to use the default. • Choose **Daily** to search for and display report output by day. • Choose **Meeting** to search for and display report output by period. • Choose **Interval** to search for and display report output by interval. • Choose **Time** to search for and display report output by time. • Choose **Time/Interval** to search for and display report output by time and interval.
Attendance Conversion	Use the pop-up menu to select the method by which attendance is calculated for which you want to run this report. Menu options appear based on the Attendance Mode selected. • If the Attendance Mode of **Use Defaults** was selected, **Use Defaults** displays by default. There are no other menu options to choose from. • If the Attendance Mode of **Daily** was selected, choose either **Code to Day**, **Percent Time to Day**, or **Time to Day**. If the Attendance Mode of **Meeting** was selected, choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. • If the Attendance Mode of **Interval** was selected, only the **Time to Day** conversion can be selected. • If the Attendance Mode of **Time** was selected, only the **Time to Day** conversion can be selected. • If the Attendance Mode of **Time/Interval** was selected, only the **Time to Day** conversion can be selected. **Note:** For more information about attendance conversions, see *Attendance Overview*.

Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • Select **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range. Click the number to display the list of selected students. • Select **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the “Students to Include” field and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the “Students to Include” field.
Begin Date and Ending Date	Enter the beginning and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date must fall within the selected school year term.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields.

	After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.
Data to be filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Include Absent Column	Select the checkbox to display the total and average absent data on the report.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

   Each row in the report represents a student enrollment that falls partly or within the report date range. The table below describes each column in the output file:

Column Name	Description
[Blank]	Row number.
Student Number	Unique student identifier assigned to the student in the district.

Name	Student’s name (Lastname, Firstname MI). **Note:** If a student appears more than once on this report, this is usually because the student was enrolled in the school, transferred out during the year, and then transferred back into the school before the end of the school year. Verify the duplicate entry on this report by referring to the student's Transfer Information page. For more information, see *Transfer Information*.
Grade (Track)	Student’s grade level during the enrollment period between the Entry Date and Exit Date.
School Number	School number associated with the enrollment record. Because this is a school-level report, it will always be the current school's number.
School	School name abbreviation associated with the enrollment record. Because this is a school-level report, it will always be the current school's name.
Entry Date	Enrollment entry date for the enrollment record that is part of the calculation.
Exit Date	Enrollment exit date for the enrollment record that is part of the calculation.
Membership	Total membership days calculated for the student’s enrollment record for the specified date range.
Attendance	Total attendance calculated for the student’s enrollment record for the specified date range.
Absence	Total number of absences for the specified date parameters.
Off Track Days	Number of days the student was not on track within the specified date range, if the student is assigned to a track.

Days Not Enrolled	Number of days the student was not enrolled within the report date range.

ADM/ADA by Minute Report

The ADA/ADM by Minute report displays the total number of potential minutes for students, total number of minutes missed, total number of minutes attended, and total percentage of each. When in Meeting mode, the system calculates the number of minutes the group of students has attended by period. When in Daily mode, the system displays the number of minutes the group of students has attended by day.

How to Run the ADM/ADA by Minute Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **ADM/ADA by Minute**. The ADA/ADM by Minute Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to select the attendance recording method for which you want to run this report. **Note:** Menu options appear based on your attendance setup configuration. For more information about attendance modes, see *Attendance Overview*. • Choose **Daily** to search for and display report output by day. • Choose **Meeting** to search for and display report output by period.
Students to Include	Indicate which students you want to run the report for by selecting one of the following options:

	• Select **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range. Click the number to display the list of selected students. • Select **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the “Students to Include” field and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the “Students to Include” field.
Begin Date and Ending Date	Enter the beginning and ending date of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date entered must fall within the selected school year term.
Processing Options	Select a time to run the report: • Choose **In Background Now** to execute the report immediately in the background. • Choose **ASAP** to execute the report in the order it is received in the Report Queue. • Choose **At Night** to execute the report during the next evening. • Choose **On Weekend** to execute the report during the next weekend. • Choose **On Specific Date/Time** to execute the report on the date and time specified in the Specific Date/Time fields.

	After submitting this report, it will be processed in the report queue. On the navigation bar, click the **Report Queue** button. The Report Queue - My Jobs page displays all your reports.
Specific Date/Time	If you selected the **On Specific Date/Time** processing option, enter the date to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. Use the pop-up menus to indicate hour and minute.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

Note: Click **Refresh** to update the status of the report.

The report appears. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

The table below describes each column in the output file when running the report for Meeting attendance mode. Each row in the report represents a period in the school bell schedule.

Column Name	Description
Period	The meeting period number.
Total Potential	Two numbers appear for the total potential absences: • Total number of periods in the selected students' bell schedules in the specified date range. • Total number of minutes in the selected students' bell schedules in the specified date range.
Total Absences	Two numbers appear for the total absences:

	• Number of periods when the selected students were absent. • Number of minutes when the selected students were absent.
Total Absences %	Two numbers appear for the total percentage of absences in relation to potential absences: • Percentage of periods when the selected students were absent. • Percentage of minutes when the selected students were absent.
Total Attended	Two numbers appear for the total attendance: • Number of periods when the selected students were present. • Number of minutes when the selected students were present.
Total Attended %	Two numbers appear for the total attendance by percentage: • Percentage of periods when the selected students were present. • Percentage of minutes when the selected students were present.

The table below describes each column in the output when running the report for Daily attendance mode. This report displays only one row.

Column Name	Description
Total Potential	Total number of minutes in the selected students' full day bell schedules in the specified date range.

	Note: The calculation uses the number of minutes specified for the bell schedule item that represents the Meeting and Daily attendance bridge.
Total Absences	Number of minutes when the selected students were absent.
Total Absences %	Percentage of minutes when the selected students were absent.
Total Attended	Number of minutes when the selected students were present.
Total Attended %	Percentage of minutes when the selected students were present.

Scheduling Reports

Student Program Balancing Report

The Student Program Balancing report provides a summary of students enrolled in programs, as well as a detailed account of percentages of students enrolled in those programs.

How to Run the Student Program Balancing Report

When running the Student Program Balancing report from the System Reports menu, only students enrolled in programs for the selected school will be included in the report.

Note: Dropped students are not included in the report output.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab under Scheduling, click **Student Program Balancing**. The Student Program Balancing page appears.
3. Use the following table to enter information in the fields:

Field	Description

Evaluate Enrolled Program Students as of This Date	To narrow search results by a specific enrollment date, enter or select a date. Only those students enrolled in a program on or after specified date will be evaluated. **Note:** Defaults to today's date. **Notes:** When enrolling students in programs, an **Exit Date** may be entered. For more information, see *Special Programs*. If a program's enrollment **Exit Date** has not been entered, those enrollments will count toward that program.
Term	To narrow search result by term, choose the appropriate term from the pop-up menu. Only those students enrolled in a section within the specified term and any overlapping terms will be evaluated.
Report Output Locale	Use the pop-up menu to choose which language you want the report output to display.

4. Click **Submit**. The Student Program Balancing Report page displays the following information:

[Name of School] - [Date] **Enrollment Totals** **Total Number of Students: [Number]**	
Field	**Description**
Program	The name of the program. **Note:** For more information, see *Special Program Setup*, for district setup and *Special Programs* for student entry.
Percentage	The percentage of students in the program for the selected school.
Number of Program Students	The number of students in the program for the selected school.

Percentage of Students Enrolled in Programs [Course Name] ([Course Number])	
Field	**Description**
Section Number	The section number(s) of the course in which program students are enrolled. Click to access the Edit Section page. For more information, see *Sections*.
Program	The name of the program(s).
Percentage	The percentage of students enrolled in the program for the selected section.
Program Students in Section	The number of students enrolled in the program for the selected section.
Total Students in Section	The total number of students enrolled in the program compared to the overall number of students enrolled for the selected section. Click the total number of students enrolled in the program to access the Class Roster page. For more information, see *Class Roster*. A single asterisk indicates the percentage of program students (calculated against the number of students enrolled in the section) is greater than the percentage of program students enrolled in the school. For example, 18*/30 indicates that the percentage of program students enrolled in the section, as calculated by ((number of program students in the section - 1 / total number of students in the section) *100) is greater than the percentage of program students enrolled in the school, as calculated by ((number of program students in the school/ total number of students enrolled in the school) *100). A double asterisk indicates the percentage of program students (calculated against the maximum number of students allowed in the section) is greater than the percentage of program students

	enrolled in the school. For example, 18/30* indicates that the percentage of program students enrolled in the section, as calculated by ((number of program students in the section - 1 / max number of students allowed in the section) *100) is greater than the percentage of program students enrolled in the school, as calculated by ((number of program students in the school/ total number of students enrolled in the school) *100).

Student Program Balancing Report in PowerScheduler

When running the Student Program Balancing report from the PowerScheduler menu, only students scheduled in programs for the selected scenario will be included in the report.

Note: Dropped students are not included in the report output.

How to Run the Student Program Balancing Report in PowerScheduler

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Under Post Build Reports, click **Student Program Balancing**. The Student Program Balancing page appears.
4. Use the following table to enter information in the fields:

Field	Description
Evaluate Scheduled Program Students as of This Date	To narrow search results by a specific enrollment date, enter or select a date. Only those students enrolled in a program on or after specified date will be evaluated. **Note:** Defaults to date entered in **Evaluate Programs as of this date** field. See *How to Define Program Balancing*.
Term	To narrow search result by term, choose the appropriate term from the pop-up menu. Only those students enrolled in a section within the specified term and any overlapping terms will be evaluated.

Report Output Locale	Use the pop-up menu to choose which language you want the report output to display.

5. Click **Submit**. The Student Program Balancing Report page displays the following information:

[Name of School] - [Date] Enrollment Totals Total Number of Students: [Number]	
Field	**Description**
Program	The name of the program.
Percentage	The percentage of students in the program for the selected scenario.
Number of Program Students	The number of students in the program for the selected scenario.
Percentage of Students Enrolled in Programs [Course Name] ([Course Number])	
Field	**Description**
Section Number	The section number(s) of the course in which program students are enrolled. Click to access the Edit Section page. For more information, see *Sections*.
Program	The name of the program(s).
Percentage	The percentage of students enrolled in the program for the selected section.

Program Students in Section	The number of students enrolled in the program for the selected section.
Total Students in Section	The total number of students enrolled in the program compared to the overall number of students enrolled for the selected section. Click the total number of students enrolled in the program to access the Class Roster page. For more information, see *Class Roster*. A single asterisk indicates the percentage of program students (calculated against the number of students scheduled in the section) is greater than the percentage of program students scheduled in the school. For example, 18*/30 indicates that the percentage of program students scheduled in the section, as calculated by ((number of program students scheduled in the section - 1 / total number of students scheduled in the section) *100) is greater than the percentage of program students scheduled in the school, as calculated by ((number of program students scheduled in the school/ total number of students scheduled in the school) *100). A double asterisk indicates the percentage of program students (calculated against the maximum number of students allowed in the section) is greater than the percentage of program students scheduled in the school. For example, 18/30* indicates that the percentage of program students scheduled in the section, as calculated by ((number of program students scheduled in the section - 1 / max number of students allowed in the section) *100) is greater than the percentage of program students scheduled in the school, as calculated by ((number of program students scheduled in the school / total number of students scheduled in the school) *100).

Teacher Maximum Load Report

The Teacher Maximum Load Report helps identify teachers who are scheduled to teach more students in a day than is allowed by their contracts. It is expected that a school administrator will run this report on a periodic basis to identify any violations for sections occurring within the term of the date specified on the report. This report displays loads based on the schedule for the current school year but does not account for future section drops or enrollments. For fresh report data or for more information about Teacher

Maximum Load, see *Teacher Maximum Load*. Also, this report does not account for sections that span different schools; rather, they include only the selected school's sections.

How to Run the Teacher Maximum Load Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Teacher Maximum Load Report**. The Teacher Maximum Load page appears.
3. Use the following table to enter information in the fields:

Field	Description
Select a Teacher	Use the pop-up menu to select the teacher for whom you want to run this report. To select all teachers at the selected school, choose **All Teachers**.
Limit report to	Select an option to limit the results of the report: • **All Selected Teacher(s)**: Displays results for all teachers selected in the Select a Teacher field, even those whose schedules do not exceed their maximum loads. • **Only those over the limit**: Displays only the teachers selected in the Select a Teacher field that exceed the specified student load.
For this date	Enter a date to display report results for. Use the format mm/dd/yyyy or mm-dd-yyyy.

4. Click **Submit**. The report displays the following information:

Field	Description
No.	Teacher's number.
Teacher Name	Teacher’s last name, first name, and middle initial.

Course	Name of the course that has a section contributing to the teacher's student load.
Section	Identification number of the section contributing to the teacher's student load. If the section includes a dependent section, the report does not specify whether the violation occurred in the primary or dependent section since they are considered a single unit. **Note:** To exempt a section from being included, see *Sections*.
Max	Maximum number of students allowed in the section.
Room	Room number of the section.
[A, B, ...]	Cycle day of the school's schedule.
Flag	Indicates whether a teacher maximum load or section enrollment maximum has been exceeded.

Statistics

Parent/Student Access Statistics Report

The Parental Access Statistics Report tells you how often the parents of students at your school use the PowerSchool Parent or PowerSchool Student Mobile apps to sign in to PowerSchool or use the PowerSchool Parent/Student Web Portal to check student progress. The report provides information on all parents in general and not on specific parents.

How to Run the Parent/Student Access Statistics Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Parental Access Statistics**. The Parental Access Statistics page appears.

3. Enter the first and last days of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
4. Click **Submit**. The resulting report displays how many times parents accessed student records via the mobile apps or the Web portal. Raw data and percentages are provided. The report also displays the number of parents signed up for emailed progress reports and the number of reports sent during the selected period.

   Proceed by printing the report from your Web browser or saving it to another application. For more information, see *Run, Print, and Save Reports*.

Student Listing Reports

At Risk Report

The At Risk Report provides a listing of courses, sections, and grades associated with students who are currently at risk of failing for the current term. This information allows administrators and teachers to take a proactive approach to correcting this prior to end of term and ensures student accountability.

How to Run the At Risk Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **At Risk**. The At Risk Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to choose the attendance recording methods for which you want to run this report: • Choose **Daily** to search for and display report output by day. • Choose **Meeting** to search for and display report output by period.

	• Choose **Time** to search for and display report output by time.
Students to Include	Indicate which students you want to run the report for: • Choose **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range. • Choose **All students** to run the report for all students in the current school enrolled in the specified date range.
Attendance Codes	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the attendance codes you want to scan.
Reporting Segment or Begin date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. **Note:** The date must fall within the selected school year term.
Data to be Filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Use Attendance Report Query	Select the checkbox to use Attendance Mode and Attendance Codes to query students for the report.

Enter the minimum number of occurrences of the above selected Attendance codes	Enter a number to indicate the fewest instances of the selected Attendance Codes to display on the report.
Use Grades Report Query	Select the checkbox to use the three grade fields listed below to query students for the report.
Select the final grade type	Choose the applicable grade type from the pop-up menu: • **Stored** • **Current**
Enter the minimum number of classes with failing grades	Enter the minimum number of classes with failing grades to display on the report.
Enter a comma-delimited list of Letter Grade values.	Enter the letter grade value, followed by a comma, such as **D, F**.
Use Discipline Report Query	Select the checkbox to use the two discipline fields listed below to query students for the report.
# of Discipline actions per student	Choose the applicable number of discipline actions to display for each student from the pop-up menu.
Discipline incident subtype to include	Choose the applicable incident subtype from the pop-up menu.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Student listing reports display lists of students, either by class or schedule.

At Risk Report

The At Risk Report provides a listing of courses, sections, and grades associated with students who are currently at risk of failing for the current term. This information allows administrators and teachers to take a proactive approach to correcting this prior to end of term and ensures student accountability.

How to Run the At Risk Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **At Risk**. The At Risk Report page appears. The upper portion of the page displays the report's name, version number, description, and comments.
3. Use the following table to enter information in the fields:

Field	Description
Attendance Mode	Use the pop-up menu to choose the attendance recording methods for which you want to run this report: • Choose **Daily** to search for and display report output by day. • Choose **Meeting** to search for and display report output by period. • Choose **Time** to search for and display report output by time.
Students to Include	Indicate which students you want to run the report for: • Choose **The selected [x] students only** to run the report for students in the current selection enrolled in the specified date range.

	• Choose **All students** to run the report for all students in the current school enrolled in the specified date range.
Attendance Codes	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the attendance codes you want to scan.
Reporting Segment or Begin date and Ending Date	Select which date range to use for this report: • **Reporting Segment**: Choose a reporting segment from the pop-up menu. For more information about reporting segments, see *Reporting Segments*. • **Begin Date and Ending Date**: Specify a date range in the blank fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. • **Note:** The date must fall within the selected school year term.
Data to be Filled	In this section, select the checkbox next to the following filter fields to save the settings as defaults. From the pop-up menu, choose **Set All** to select all checkboxes and **Reset All** to remove all checkboxes next to the following fields.
Use Attendance Report Query	Select the checkbox to use Attendance Mode and Attendance Codes to query students for the report.
Enter the minimum number of occurrences of the above selected Attendance codes	Enter a number to indicate the fewest instances of the selected Attendance Codes to display on the report.
Use Grades Report Query	Select the checkbox to use the three grade fields listed below to query students for the report.

Select the final grade type	Choose the applicable grade type from the pop-up menu: • **Stored** • **Current**
Enter the minimum number of classes with failing grades	Enter the minimum number of classes with failing grades to display on the report.
Enter a comma-delimited list of Letter Grade values.	Enter the letter grade value, followed by a comma, such as **D, F**.
Use Discipline Report Query	Select the checkbox to use the two discipline fields listed below to query students for the report.
# of Discipline actions per student	Choose the applicable number of discipline actions to display for each student from the pop-up menu.
Discipline incident subtype to include	Choose the applicable incident subtype from the pop-up menu.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Class Rosters (PDF) Report

Generate a class roster as a PDF file for the current term or previous terms.

How to Run the Class Rosters (PDF) Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Class Rosters (PDF)**. The Class Rosters (PDF) page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Print rosters for	Select the teachers for which you want to generate a class roster. To select multiple teachers, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each teacher's name.
Meetings	Indicate the meetings to be audited by selecting the appropriate checkboxes. To audit all meetings, deselect all of the checkboxes.
Include students who	Select an enrollment period option. Some options require you to enter a date or date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Heading font	Choose the heading font from the pop-up menu.
Size, line height, style	Enter the heading font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the heading. Select the **Italic** checkbox to italicize the heading. Select the **Underline** checkbox to underline the heading.
Print heading on	Choose an option from the pop-up menu to determine how you want the heading to print: • **First page of each class** • **All pages** • **Do not print heading**

Heading text	Enter the content you want to appear in the heading. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
Column title font	Choose the column title font from the pop-up menu.
Size, line height, style	Enter the column title font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the column title. Select the **Italic** checkbox to italicize the column title. Select the **Underline** checkbox to underline the column title.
Print column titles on	Choose an option from the pop-up menu to determine how you want the column title to print: • **All pages** • **First page of each class** • **Do not print column titles**
Roster Font	Choose the roster listing font from the pop-up menu.
Size, line height, style	Enter the roster listing font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the roster listing. Select the **Italic** checkbox to italicize the roster listing. Select the **Underline** checkbox to underline the roster listing.

Roster columns	Enter the content to include in the student listings columns using the format field name \ column title \ column width \ alignment. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
Rule width	Enter the thickness in points of the vertical and horizontal lines on the report, as well as the outline of the entire report. One point equals 1/72 of an inch.
Cell padding	Enter the width of each cell and the amount of space from all sides of the cells to the text in points. One point equals 1/72 of an inch.
Page size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Enter the size of the margins in inches.
Orientation, Scale	Use the pop-up menu to choose the page layout. **Portrait** is a vertical page; **landscape** is a horizontal page. Scale is the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.

Watermark mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Master Schedule (PDF) Report

Generate a PDF file for the current master schedule. The master schedule PDF report displays schedule information for sections that are in session during the selected term. Before proceeding, change the selected term, if necessary. For more information, see *How to Change Terms*.

How to Run the Master Schedule (PDF) Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Master Schedule (PDF)**. The Master Schedule PDF page appears.
3. Use the following table to enter information in the fields:

Field	Description
Periods	Select the checkboxes to indicate which periods to display on the master schedule. To display all periods, select the **All periods** checkbox.
Days	Select the checkboxes to indicate which days to display on the master schedule. To display all days, select the **All days** checkbox.
Credit Type	Enter the credit type to indicate which credit type to display on the master schedule, such as **MATH**. To display all credit types, do not enter anything in the field.
Rooms	Select the rooms to display on the master schedule. To make multiple selections, Press and hold COMMAND (Mac) or CONTROL (Windows) and click the room names. Select **All Rooms** to display all rooms.
Teachers	Select the teachers to display on the master schedule. To make multiple selections, Press and hold COMMAND (Mac) or CONTROL (Windows) and click the teacher names. Select **All Teachers** to display all teachers.
Sort By	Select a sort order for the master schedule: • **Teacher Name** • **Teacher Number** • **Department** • **Room** • **Course Name** • **Course Number** • **Course Credit Type**
Period/Day Orientation	Select whether to print the periods or the days across the top of the report.
Heading font	Choose the heading font from the pop-up menu.

Size, line height, style	Enter the heading font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the heading. Select the **Italic** checkbox to italicize the heading. Select the **Underline** checkbox to underline the heading.
Print heading on	Choose an option from the pop-up menu to determine how you want the heading to print: • **First page** • **All pages** • **Do not print heading**
Column title font	Choose the column title font from the pop-up menu.
Size, line height, style	Enter the column title font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the column title. Select the **Italic** checkbox to italicize the column title. Select the **Underline** checkbox to underline the column title.
Print column titles on	Choose an option from the pop-up menu to determine how you want the column title to print: • **All pages** • **First page** • **Do not print heading**
Body Font	Choose the body font from the pop-up menu.
Size, line height, style	Enter the body font size and line height in points. One point equals 1/72 of an inch. Select the **Bold** checkbox to bold the body font. Select the **Italic** checkbox to italicize the body font. Select the **Underline** checkbox to underline the body font.

Cell padding	Enter the width of each cell and the amount of space from all sides of the cells to the text in points. One point equals 1/72 of an inch.
Page size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Enter the size of the margins in inches.
Orientation, Scale	Use the pop-up menu to choose the page layout. **Portrait** is a vertical page; **landscape** is a horizontal page. Scale is the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

4. Click **Submit**. The report queue appears.
5. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application. For more information, see *Run, Print, and Save Reports*.

Student Schedule List Report

This report provides a printout of students' classes and lets you know where they are during which periods.

How to Run the Student Schedule List Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Student Schedule List**. The Student Schedule List page appears.
3. Use the following table to enter information in the fields:

Field	Description
Students to Include	The number of selected students appears.
Report Title	Enter the title for the report.
Include for each class	Select the checkboxes to indicate what data you want to include for each class. Select any combination of the following checkboxes: • Select the checkboxes to display the **Room**, **Course**, and **Teacher** information for each class. • To include grades, select the checkbox and use the pop-up menu to choose either **Historical grade** or **Current grade**. If you select this option, enter the Store Code/Final Grade, such as **Q1** or **Q2**.

	• **Citizenship** • **for this attendance code**. If you select this option, choose the attendance code from the pop-up menu. • **Attendance points** • **Assignment score**. If you select this option, enter the score.
Scan Enrollment as of this Date	Enter the student enrollment dates to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Range of Periods	Choose the range of periods to scan from the pop-up menus.
Range of Days	Choose the range of days to scan from the pop-up menus.
How many students between breaks	Enter the number of student records to display before a break in the report.
Show only these pages	Select the checkbox to limit the number of pages to display. If you select the checkbox, enter the page number range in the next fields.

4. Click **Submit**. The resulting report displays students and their teachers for the selected periods. Proceed by printing the report from your Web browser or saving it to another application. For more information, see *Run, Print, and Save Reports*.

ReportWorks

ReportWorks provides the tools to give report developers an easy way to find, evaluate, and share information that is available in PowerSchool.

ReportWorks reports are created in the ReportWorks application and published to PowerSchool. The report developer determines the report format and runtime parameters. Each report may have different parameters you can select, such as grade level or enrollment dates.

For more information about setting ReportWorks preferences and creating report categories, see *ReportWorks Administration.*

Database Extensions

Any database extensions related to the Students table created in PowerSchool or migrated from database extensions (legacy custom fields), are available to use in ReportWorks. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.

How to Launch ReportWorks Developer

You must have security permissions enabled to launch the ReportWorks developer application. For more information, see *Security Permissions*.

1. On the start page, do one of the following:
    - Choose **ReportWorks Developer** under Applications in the main menu.
    - Choose **ReportWorks > Setup** > **ReportWorks**.

    The Launch ReportWorks page appears.

2. Click **Launch**. For more information, see the *ReportWorks User Guide* or the *ReportWorks online help*.

How to Generate ReportWorks Reports

1. On the start page, choose **ReportWorks** under Reports in the main menu. The Reports page appears.
2. Select a report. The Run Report dialog appears.
3. Use the following table to edit information in the fields.

Field	Description
Report Name	The name of the report appears.
Description	The report description appears.
Category	The assigned report category appears. For more information, see *ReportWorks Categories*.
Published Date	The date the report was published appears.
Runtime Parameters	The runtime parameters that appear depend on the type of report selected. • Select Grade Level: Select a single grade level or multiple grade levels to include in the report output. Press ALT+click or SHIFT+click on grade levels to select multiple grade levels. • Select Current Students: Click the checkbox to include the current student selection in the report. For more information, see *Current Selection*. • Select School Enrollment Dates: Enter a **Starting Date** and **Ending Date** in the fields provided using the mm/dd/yyyy or m/d/yyyy format. Alternately, click the blue icon next to the filed to open the calendar pick list and click on the applicable date. • Select Class Enrollment Dates: Enter a **Starting Date** and **Ending Date** in the fields provided using the mm/dd/yyyy or m/d/yyyy format. Alternately, click the blue icon next to the filed to open the calendar pick list and click on the applicable date.
Cancel	Click to close the dialog without submitting the report.
Run Now	Click to submit the report.

4. When the report is submitted, the report queue appears. For more information, see *ReportWorks Queue*.

Custom Reports

Use PowerSchool to set up reusable report templates according to your individual needs. The resulting reports provide you with customized views of the information stored in PowerSchool. Print the reports, save them, or use them as view-only tools. As the data stored on the system changes regularly, the report results will likely change every time you run a new report, even if you use the same template.

Custom reports are different from preconfigured reports because you decide what information to include in the final report and how it will look.

While all reports can be run for all students, some can be run for a selected group of students. If the report you choose allows this option, select the group of students and click the **PowerSchool** logo to return to the start page. PowerSchool remembers the group while you are signed in to and will allow you to select the group as you build the report template.

There are four styles of PowerSchool custom reports: report cards, mailing labels, form letters, and object reports. Each can be created to meet your needs, and all four styles can be saved as templates for reuse. For more information about report templates, see *Report Templates*. For more information about other ways to create reports, see *Alternate Ways to Create Reports*.

Report Cards

Report card reports can be used for much more than just end-of-the-term reports. You can also use them to create other types of documents, such as custom letters or progress reports. Any report card-style report can include text as well as PowerSchool fields.

You can only create report cards for the term selected on the start page. To report on more than one term, create an object report. For more information, see *Object Reports*.

How to Open a Preview Page

When creating custom reports, it is a good idea to preview them often as you work. Therefore, before you create any new reports, you should open a preview page in your Web browser.

1. On the start page, search for and select any student or group of students. For more information, see *Select a Group of Students*.
2. Click the PowerSchool logo. The start page appears.
3. Choose **System Reports** under Reports in the main menu. The Reports page appears.

4. Click the **Setup** tab. The Report Setup page appears.
5. Click **Form Letters**. The Form Letters page appears.
6. Click **Print**. Leave the Print Reports page open as you create each type of report in a new Web browser window. You will return to it to review the report template as you work. Within other instructions, this page is referred to as the preview page.

How to Add a Custom Report Card Template

You can customize the following elements of a report card template:

- *Heading*
- *Schedule Listing*
- *Footer*
- *Availability*
- *Page Setup*
- *Print Setup*

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Report Cards**. The Report Cards page appears.
4. Click **New**. The Create New Report Card Format page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Name of new report card template	Enter a name for the template.
Title	Enter a title to print at the top of the report card. In addition to standard text, you can include HTML tags and PowerSchool data codes.
Title style	Choose a style from the pop-up menu. To configure the styles, see *System Styles*.

6. Click **Submit**. The Report Cards page appears.
7. Click the report you just created.

8. On the Report Card page, choose either **Left**, **Center**, or **Right** title justification from the pop-up menu.
9. Click **Submit**. The report card template setup and title are complete.

Heading

The heading can include any type of information, such as your school's address, a note to parents, HTML tags, PowerSchool fields and data codes.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Heading**. The Report Card Heading page appears.
3. Use the following table to enter information in the fields:

Field	Description
Heading Text Style	Choose the style for the heading text from the pop-up menu.
[Heading Justification]	Choose the horizontal heading alignment from the pop-up menu.
[Heading Text]	Enter the content you want to appear in the heading. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.

4. Click **Submit**. The Report Card page appears.
5. Click **Submit** again to save the report template.

Schedule Listing

Format schedule listings to display grades, citizenship, absences, tardies, and scores for individual assignments.

Note: This listing is referred to as a Student Schedule when printing reports. For more information, see *Run, Print, and Save Reports*.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Schedule Listing**. The Student Schedule Listing page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Column Titles Style	Choose a style for the column titles from the pop-up menu.
Class Listings Style	Choose a style for the class listings from the pop-up menu.
Use Future Schedule	Select the checkbox to use next year's student schedules. To use this year's schedules, deselect the checkbox.

4. Complete the remaining items, which concern the format of the report card, as necessary. To use the defaults, do not make any changes to the formatting fields. For further explanation of the fields, see *Report Formatting*. Select what data will comprise the schedule listings in the columns.
5. Use the following table to enter information in the fields:

Field	**Description**
Shows	Use the pop-up menu to choose the information for the first column on the report card. Use the next field only if you make certain choices for the Shows column. If you select any of the following in the Shows column, enter a specific term preceded with a semicolon in the next field: • **absences** • **tardies** • **attendancepoints** • **previousgrade** • **prev. percent** • **prev. tchr. cmnt**

	• **prev citizenship** • **prev crdit hours** For example, enter **;Q1** in the blank field next to the Shows column to display information for Q1. If you select **Attendance** in the Shows column, enter an attendance code. If you select **asmt score**, **asmt pct**, or **asmt pts poss** in the Shows column, enter an assignment name. The assignment name must exactly match that in the gradebook. When the Shows column is blank, but you want a title for the column, enter text or an HTML tag in the next field. PowerSchool will use the information to populate that column of the report.
Column Title	Enter a column title.
Column Width	Enter a column width.
Align	Enter one of the following codes: • **R** for right justification • **L** for left justification • **C** for center justification

6. Repeat Step 5 for other columns to be included on the report card. Create up to 12 columns.
7. Use the following table to enter information in the fields:

Field	**Description**
...include only those classes	Select the checkbox for the students who have final grades recorded in the specified term (optional). In the space provided, enter the terms/store codes, such as **Q1**, **Q2**, and **Q3**. This tells PowerSchool to list only classes for which there are stored grades for the terms listed. When a student drops a class and does not receive a final grade, the class will not appear on the report card.

Extended stored grade retrieval	Select the checkbox to include additional stored grades. This is helpful when a student switches from one section of a course to another section of the same course. The courses and grades appear on one row of the report rather than different lines for each section.

8. Click **Submit**. The Report Card page appears.
9. Click **Submit** again to save the report template.

Footer

Next, set up the footer. The footer is exactly like the heading except that it appears below the schedule listings. It can contain any type of information, including your school's address, a note to parents, HTML tags, PowerSchool fields and data codes.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Footer**. The Report Card Footer page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Footer text style	Choose the style for the footer text from the pop-up menu.
[Footer Justification]	Choose the horizontal footer alignment from the pop-up menu.
[Footer Text]	Enter the content you want to appear in the footer. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.

4. Click **Submit**. The report card footer is created, and the Report Card page appears.
5. Click **Submit** again to save the report template.

Availability

Specify which schools can access the report.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, select an option to indicate which schools on the PowerSchool system will have access to this report:
    - **users at all schools** [on the server]
    - **only users at** [selected school]
3. To indicate that teachers can print this report, select the checkbox.
4. Click **Submit**. The Report Cards page appears.
5. Click **Submit** again to save the report template.

Page Setup

Specify how the report fits on the page.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Margins & Page Setup**. The Report Card Margins page appears.
3. Use the following table to enter information in the fields:

Field	Description
Margins	Enter the margins in inches for the left, top, right, and bottom of the page.
Orientation	Choose the orientation from the pop-up menu: • **Portrait (vertical)** • **Landscape (horizontal)**
Reduction	Enter a reduction scale (optional). This refers to the finished size of the report. Fit more on a page by reducing it by a percentage but remember to leave it as large as possible for easier viewing.

4. Click **Submit**. The Report Card page appears.
5. Click **Submit** again to save the report template.

Print Setup

Specify how the report will print.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Special Printing Options**. The Special Printing Options page appears.
3. Use the following table to enter information in the fields:

Field	Description
Multiple reports per page	Select the checkbox to create more than one report per page. If you select this option, enter the number of reports that appear across (in columns) and down (in rows) on each page.
Gutter Widths	If you are printing multiple reports on each page, enter the width for the gutter between the columns and rows.
Suppress column title printing	Select the checkbox to hide the column titles.

4. Click **Submit**. The Report Card page appears.
5. Click **Submit** again to save the report template.

How to Preview a Report Card

1. Open a report preview page. For more information, see *How to Open a Preview Page*.
2. Use the following table to enter information in the fields:

Field	Description
Which report would you like to print?	Choose the report from the pop-up menu.

For which students?	Select an option to indicate the students for whom to run the report, if necessary. Indicate the number of pages to print: - To print a report for all of the selected students, choose the **All records in a single batch** option. - To print a limited number of pages, choose the **Print only the first X record**s option and enter the number of pages to print. - To print batches of reports for all of the selected students, choose the **All records in batches of X records** option and enter the number of records to print per batch.
In what order?	Select the sort order.
If printing student schedules, use	Select an option to indicate enrollment specifications. If you select the **enrollment as of** option, enter the enrollment date in the field.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the "Which report to would you like to print" field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the "Date Range," enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, choose from the pop-up menu one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to start the report: **ASAP**: Execute immediately.

	• **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.

3. Click **Submit**. The report appears with the specified parameters. Review the report to verify that the formatting and content are correct before printing.

How to Edit a Custom Report Card Template

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Report Cards**. The Report Cards page appears.
4. Click the name of the report you want to edit. The Report Card page appears.
5. Edit the report card to meet your needs and specifications. For more information, see How to Add a Custom Form Letter.
6. Click **Submit**. The Report Cards page appears. If you are ready to run the report, see *Run, Print, and Save Reports*.

How to Delete a Custom Report Card Template

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Report Cards**. The Report Cards page appears.
4. Click the name of the report you want to delete. The Report Card page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Mailing Labels

Use mailing label reports to generate mailing labels to put on envelopes or letters. Include names, addresses, ID numbers, passwords, or even bar codes. For example, create mailing labels with barcodes of students' lunch ID numbers to include on laminated lunch cards. For more information, see *How to Publish Lunch ID Numbers*.

How to Open a Mailing Label Preview Page

When creating mailing labels, you should preview them often as you work. Before you create or edit mailing labels, open a preview page.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Choose **System Reports** under Reports in the main menu. The Reports page appears.
3. Click the **Setup** tab. The Report Setup page appears.
4. Click **Mailing Labels**. The Mailing Labels page appears.
5. Click **Print**. Leave the Print Mailing Labels page open as you work with mailing labels. You will return to it to review the template as you work. Within other instructions, this page is referred to as the preview page.

How to Add a Mailing Label Layout

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Mailing Labels**. The Mailing Labels page appears.
4. Click **New**. The New Mailing Label Layout page appears.
5. Use the following table to enter information in the fields:

Field	Description
Layout Name	Enter the name of the mailing label layout.
Table	Choose the table used for the mailing label data from the pop-up menu.
Font	Choose the mailing label font from the pop-up menu.
Font Size	Enter the font size for the mailing label in points. **Note:** One point is 1/72 of an inch.
Line Height	Enter the height for the space between lines on the mailing label in points. **Note:** One point is 1/72 of an inch.

Page Left Margin	Enter the size of the left page margin in inches.
Page Top Margin	Enter the size of the top page margin in inches.
Label Width	Enter the width of the individual mailing labels in inches.
Label Height	Enter the height of the individual mailing labels in inches.
How Many Columns of Labels	Enter how many columns of mailing labels print per page.
How Many Rows of Labels	Enter how many rows of mailing labels print per page.
Space Between Each Column	Enter the amount of space between columns of mailing labels on the page in inches.
Space Between Each Row	Enter the amount of space between rows of mailing labels on the page in inches.
Horizontal Padding For Label Text	Enter the amount of space from the sides of a mailing label to the text.
Vertical Padding For Label Text	Enter the amount of space from the top and bottom of a mailing label to the text.
Label Content	Enter the content of the mailing label. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.

	3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
Make this label accessible to	Select which PowerSchool users can use the mailing label: • **users at all schools** [on the server] • **only users at** [selected school]
Teachers can print?	Select the checkbox if you want teachers to be able to print this mailing label.

6. Click **Submit**. The Mailing Labels page appears. To print mailing labels, see *Print Mailing Labels*.

How to Edit a Mailing Label Layout

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Mailing Labels**. The Mailing Labels page appears.
4. Click the mailing label layout you want to edit. The Edit Mailing Label Layout page appears.
5. Edit the report card to meet your needs and specifications. For more information, see *How to Add a Mailing Label Layout*.
6. Click **Submit**. The Mailing Labels page appears. To print mailing labels, see *Print Mailing Labels*.

How to Delete a Mailing Label Layout

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Mailing Labels**. The Mailing Labels page appears.
4. Click the mailing label layout you want to delete. The Edit Mailing Label Layout page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Print Mailing Labels

Print mailing labels to address envelopes for student letters, create barcodes for lunch ID cards, or for many other purposes. Before printing an existing mailing label, be sure you are familiar with its content and format. For information about creating mailing labels, see *Mailing Labels*.

How to Print Mailing Labels

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Printing, choose **Print Mailing Labels**. The Print Mailing Labels page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Print Mailing Labels for	The selected number of students appears. For more information about changing the selection of students, see *Student Search*.
Use this mailing label layout	Choose the mailing label template from the pop-up menu.
How Many Pages?	Select an option to indicate the number of pages to print: • **One page only** to print only the first page • **All pages** to print all pages of the report for the selected students
Sort Order?	Select an option to sort the mailing labels on the report:

	• **Student's last name** • **Mailing Zip Code** • **Address Zip Code**
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. **Note:** When generating object reports, certain report text may appear in the default English language. For more information, see *Object Reports*.

5. Click **Submit**. The report queue appears.
6. Click **View** once the report is completed.

   Note: Click **Refresh** to update the status of the report.

   The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application.

7. When you are satisfied with the labels, put sheets of blank labels in the printer tray.
8. Choose **File** > **Print** from the menu bar.
9. Make the necessary selections in the Print dialog.
10. Click **OK**. The mailing labels print.

Form Letters

Form letter reports create custom letters that merge information from the PowerSchool database into a letter. They are similar to report card reports in that you can use HTML tags and PowerSchool data codes. The difference is that a form letter report cannot include schedule listings.

When creating a form letter, there is no need to open a preview page. You can easily create the report and preview it in the same Web browser window.

How to Add a Custom Form Letter

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Form Letters**. The Form Letters page appears.
4. Click **New**. The New Form Letter page appears.
5. Use the following table to enter information in the fields:

Field	Description
Title of this form letter	Enter a name for this form letter.
Table	Choose the table used for the form letter data from the pop-up menu.
Default font	Choose the form letter font from the pop-up menu.
Default font size	Choose the font size from the pop-up menu.
Default text line height	Enter the height for the space between lines on the mailing label in points. **Note:** One point is 1/72 of an inch.
Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Enter the size of the page margins in inches.

Orientation	Choose the page orientation from the pop-up menu. The orientation is the page layout. **Portrait** is a vertical page; **Landscape** is a horizontal page.
Scale	Enter the percentage to scale the form letter. The lower the percentage, the smaller the form letter scales relative to the size of the page.
This report available to	Select who can use this report: • **users at all schools** [on this PowerSchool system] • **only users at** [this school]
Teachers can print?	If you want teachers to be able to print this report in PowerSchool Teacher, select the checkbox. Otherwise, deselect the checkbox.

6. Click **Submit**. The form letter is set up, and the Form Letters page appears.
7. Click the form letter you just created. The Edit Form Letter page appears.
8. Click **Report Body**. The Edit Body page appears.
9. Enter the content of the letter. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes.
10. To insert a PowerSchool field into this field:
    1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears.
    2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
    3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
11. Click **Submit**. The Form Letters page appears.
12. Click **Print**. The Print Reports page appears.
13. Use the following table to enter information in the fields:

Field	**Description**
Which report would you like to print?	Choose the form letter from the pop-up menu.

For which students?	Select an option to indicate the students for whom the report will be run, if necessary.
In what order?	Select the sort order.
If printing student schedules, use...	Select an option to indicate enrollment specifications. If you select the **enrollment as of** option, enter the enrollment date in the field.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the **Which report to print** field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the **Date Range**, enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.

14. Click **Submit**. The report queue appears.
15. Click **View** once the report is completed.

Note: Click **Refresh** to update the status of the report.

The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application.

How to Edit a Custom Form Letter

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Form Letters**. The Form Letters page appears.
4. Click the form letter you want to edit. The Edit Form Letter page appears.
5. Use the following table to edit information in the fields:

Field	Description
Title of this form letter	Edit this form letter's name.
Table	The table used for the form letter data appears.
Default font	Choose the form letter font from the pop-up menu.
Default font size	Choose the font size from the pop-up menu.
Default text line height	Edit the height for the space between lines on the mailing label in points. **Note:** One point is 1/72 of an inch.
Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Edit the size of the page margins in inches.

Orientation	Choose the page orientation from the pop-up menu. The orientation is the page layout. **Portrait** is a vertical page; **Landscape** is a horizontal page.
Scale	Edit the percentage to scale the form letter. The lower the percentage, the smaller the form letter scales relative to the size of the page.
This report available to	Select who can use this report: • **users at all schools** [on this PowerSchool system] • **Only users at** [this school]
Teachers can print?	If you want teachers to be able to print this report in PowerSchool Teacher, select the checkbox. Otherwise, deselect the checkbox.

6. Click **Report Body**. The Edit Body page appears.
7. Enter the content of the letter. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes.
8. To insert a PowerSchool field into this field:
    1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears.
    2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
    3. Click the field you want to add. The Fields pop-up closes, and the selected field appears.
9. Click **Submit**. The Form Letters page appears. If you are ready to print the letter, see *Run, Print, and Save Reports*.

How to Delete a Custom Form Letter

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Form Letters**. The Form Letters page appears.
4. Click the name of the form letter you want to delete. The Edit Form Letter page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Object Reports

Use object reports to create and print official school reports and documents such as transcripts (traditional grades and standards grades), scheduling forms, report cards, letters, and award certificates for students.

These reports are called object reports because you can insert objects such as boxes, lines, circles, logos, and pictures into them. When you create each object, you determine where it appears on the report in relation to the other objects. These objects appear on the electronic or paper output according to the specifications you enter on each object's setup page. The best way to generate an object report is to create a few objects and print a sample to ensure that it looks as it should. For more information, see *Objects on an Object Report*.

Use object reports to display information related to standards and tests. For more information, see *Object Reports With Standards Grades* and *Object Reports with Test Tags*, respectively.

When creating custom report—especially object reports—it is a good idea to preview them frequently as you work. Therefore, before creating any new reports, open a preview page. You can preview and print any type of custom report from the Print Reports page.

Note: Reports created using the Log table are only accessible by clicking **Print a Report** on the Log Entry Functions page. For more information, see *Report on Log Entries*.

For reports pertaining to a group of students, select a group of students and click the **Select Function** arrow and choose **Print Reports** from Group Functions pop-up menu. For more information, see *How to Open a Preview Page*.

Important Information When Localizing Object Reports

- When generating an object report, the selected locale specifies only the Data Access Tags (DATs) used in the report. The report developer must enter the report title and any body text in the applicable language. If the DATs are not localized for the selected locale, the default English tags will display on the report.
- DAT descriptions, for example ^(he/she), are not localized and are treated as fields in the object report. Only the output of that DAT will be localized.
- Object report text and DATs can be localized for any single-byte language (French, Spanish, German, etc.). Multi-byte character languages (Chinese, Arabic, Hindi, Hebrew, etc.) are not available for object report localization at this time.
- Custom DAT tags that incorporate numbers or dates/times (created in **District Setup > GPA Settings > GPA Calculation Methods**) will not be localized. These are treated as strings, so they will not have the locale-specific numeric or date formats applied if those formats are different from the default English-US locale format.

How to Create an Object Report Template

Create an object report template to define the title of the report and other general settings such as margins, font, and font size. Then, create each object you want to include on the report. After you create all of the objects on the report and are satisfied with their placement, use the object report template to print the report.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click **New**. The New Object Report page appears.
5. Use the following table to enter information in the fields:

Field	Description
Title of this report	Enter the title of the report.
Table	Use the pop-up menu to choose one of the following tables for the report: • **Students** • **Student Schedule** • **Staff** • **Log** **Note:** Selecting **Log** from the Table pop-up menu provides you access to the Log table from which you can select any field, including database extensions (legacy custom fields) that you want to include in the report. Each field you want to include in the log object report must be specified using the correct syntax to successfully display the data. The text that precedes the syntax (separated by a colon) can be modified (or deleted) based on your needs. For example, you could modify Name: ^([01]LastFirst) to appear as Student's Last Name: ^([01]LastFirst). The following are Log table student fields you can use in the report:

	- Name: ^([01]LastFirst) - Grade: ^([01]Grade_Level) - SN: ^([01]Student_Number) - DOB: ^([01]DOB) - SSN: ^([01]SSN) - Ethnicity: ^([01]Ethnicity) - Mailing City: ^([01]Mailing_City) - Mailing Street: ^([01]Mailing_Street) - Mailing State: ^([01]Mailing_State) - Mailing Zip: ^([01]Mailing_Zip) - Alert Discipline: ^([01]Alert_Discipline) - State Student #: ^([01]State_StudentNumber) The following are Log table discipline fields you can use in the report: - Entry Author: ~(Entry_Author) - Entry Date: ~(Entry_Date) - Entry Time: ~(Entry_Time) - Title: ~(Subject) - Entry Text: ~(Entry) - Log Type ID: ~(logtypeid) - Subtype: ~(Subtype) - Category: ~(Category) - Consequence: ~(Consequence) - Incident Type: ~(Discipline_IncidentType) - Action Taken Detail: ~(Discipline_ActionTakenDetail) - Incident Type Category: ~(Discipline_IncidentTypeCategory) - Action Taken End Date: ~(Discipline_ActionTakenEndDate) - Incident Type Detail: ~(Discipline_IncidentTypeDetail) - Student Number: ~(Student_Number) - Administrator ID: ~(Discipline_AdministratorID) - Likely Injury Flag: ~(Discipline_LikelyInjuryFlag) - Alcohol Related Flag: ~(Discipline_AlcoholRelatedFlag) - Money Loss Value: ~(Discipline_MoneyLossValue) - Drug Related: ~(Discipline_DrugRelatedFlag) - Offender: ~(Discipline_Offender) - Drug Type Detail: ~(Discipline_DrugTypeDetail) - Police Involved: ~(Discipline_PoliceInvolvedFlag) - Duration Actual: ~(Discipline_DurationActual)

	- Reporter: ~(Discipline_Reporter) - Duration Assigned: ~(Discipline_DurationAssigned) - Reporter ID: ~(Discipline_ReporterID) - Duration Change: ~(Discipline_DurationChangeSource) - School Rules Vio Flag: ~(Discipline_SchoolRulesVioFlag) - Duration Notes: ~(Discipline_DurationNotes) - Sequence: ~(Discipline_Sequence) - Felony Flag: ~(Discipline_FelonyFlag) - Victim Type: ~(Discipline_VictimType) - Gang Related Flag: ~(Discipline_GangRelatedFlag) - Weapon Related: ~(Discipline_WeaponRelatedFlag) - Hate Crime: ~(Discipline_HateCrimeFlag) - Weapon Type: ~(Discipline_WeaponType) - Hearing Officer: ~(Discipline_HearingOfficerFlag) - Weapon Type Notes: ~(Discipline_WeaponTypeNotes) - Incident Context: ~(Discipline_IncidentContext) - Incident Date: ~(Discipline_IncidentDate) - Custom: ~(Custom) - Incident Location: ~(Discipline_IncidentLocation) - Action Date: ~(Discipline_ActionDate) - Incident Loc Detail: ~(Discipline_IncidentLocDetail) - Discipline Action: ~(Discipline_ActionTaken)
Default font	Choose the font in which you want the report to print from the pop-up menu. The report prints in this font unless you include an HTML tag to specify another font within an object of the report.
Default font size	Choose the size in which you want the text of the report to print from the pop-up menu. The report prints in this font size unless you include an HTML tag to specify a different font size within an object of the report.
Default text line height	Enter the default height of each line of text on the report. The line height determines the amount of space for each line of text in the object. Increasing the line height creates more space between each line of text.

Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins (inches)	Enter the size, in inches, of the left, top, right, and bottom margins for this report.
Orientation	To indicate the paper orientation of this report, use the pop-up menu to choose one of the following: • **Vertical** (portrait) • **Horizontal** (landscape)
Scale	Edit the percentage to scale the object report. The lower the percentage, the smaller the form letter scales relative to the size of the page.
This report available to	Select one of the following options to determine who can use this report: • **users at all schools** on this PowerSchool system • **only users at** [the selected school]
Teachers can print?	If you want teachers to be able to print this report, select the checkbox. Otherwise, deselect the checkbox.
Override Course Exclude Setting?	Select the checkbox to override the setting on the Course Setup page to exclude courses from inclusion in reports.

6. Click **Submit** to save the information. The report you created appears on the Object Reports page.

   To create and format objects on this report, click the report name on the Object Reports page. From this page, create all of the objects you want to include on the report such as text, pictures, lines, boxes, transcript lists, and circles. To create an object, click the type of object you want to create. For more information, see *Objects* *on an Object Report*. After you create an object, indicate the following information for that object:

- Number (sequence in which you created the object)
- Label (name you entered for the object)
- Object type (text, line, box, circle, transcript, fee list, picture, and sequence)
- Object info (pieces of information you defined for the object)
- Layer (position of the object, if it is layered with other objects)
- Page (page on which the object appears)

How to Edit an Object Report Template

Edit an object report template to define the title of the report and other general settings, such as margins, font, and font size.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report you want to edit. The Object Report page appears.
5. Click **Edit the main report parameters**. The Edit Object Report page appears.
6. Use the following table to edit information in the fields:

Field	Description
Title of this report	Enter the title of the report. The Table pop-up menu displays the table used for the report.
Default font	Choose the font in which you want the report to print from the pop-up menu. The report prints in this font unless you include an HTML tag to specify another font within an object of the report.
Default font size	Choose the size in which you want the text of the report to print from the pop-up menu.

	The report prints in this font size unless you include an HTML tag to specify a different font size within an object of the report.
Default text line height	Enter the default height of each line of text on the report. The line height determines the amount of space for each line of text in the object. For example, if you increase the line height, you create more space between each line of text.
Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins (inches)	Enter the size, in inches, of the left, top, right, and bottom margins for this report.
Orientation	To indicate the paper orientation of this report, use the pop-up menu to choose one of the following: • **Vertical** (portrait) • **Horizontal** (landscape)
Scale	Edit the percentage to scale the object report. The lower the percentage, the smaller the form letter scales relative to the size of the page.
This report available to	Select one of the following options to determine who can use this report: • **users at all schools** on this PowerSchool system • **only users at** [the selected school]
Teachers can print?	If you want teachers to be able to print this report, select the checkbox. Otherwise, deselect the checkbox.

Override Course Exclude Setting?	Select the checkbox to override the setting on the Course Setup page to exclude courses from inclusion in reports.

7. Click **Submit** to save the information. The report you edited appears on the Object Reports page.

   To create and format objects on this report, click the report name on the Object Reports page. From this page, create all of the objects you want to include on the report such as text, pictures, lines, boxes, transcript lists, and circles. To create an object, click the type of object you want to create. For more information, see *Objects on an Object Report*.

How to Delete an Object Report Template

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report you want to delete. The Object Report page appears.
5. Click **Edit the main report parameters**. The Edit Object Report page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

Objects on an Object Report

You can create many types of objects to include on an object report: text objects, line objects, box objects, circle objects, transcript objects, standards objects, fee list objects, picture objects, and sequence objects. You can create multiple objects on each object report and create the objects in any order. However, it is ideal for the objects to be listed on the Object Report page in order from top to bottom and from left to right. For example, give a logo placed in the upper-left corner of the report the label of "A Logo," then give a horizontal line placed in the middle of the page the label "B line." In this example, the picture object for the logo would be listed first, followed by the line object.

To enhance the appearance of the object report, you can format many objects. Prior to adding objects to an object report, you must first create set up the object report parameters. For more information about creating a new object report or editing an existing object report, see *Object Reports*.

When you create an object, you define where you want it to appear on a page and on which page of the report you want it to appear. To do this, define the coordinates of each object you create in inches on an X (horizontal) and Y (vertical) axis. You can use a ruler and a piece of paper to determine the coordinates of each object you create.

Use the Print Reports option on the Group Functions page to print a custom report for the selected students. For information about creating reports, see *Custom Reports*. For information about printing an object report or any type of report, see *Run, Print, and Save Reports*.

Text Objects

Text objects are boxes that contain text. Specify if you want the box to be framed or unframed. Within a text object, you can include two types of text:

- Constant text, such as a title (for example, Official Transcript). The same title appears for all students.
- Variable text, such as PowerSchool field names or codes (for example, mailing_address). Different information appears for different students.

For example, you can include the constant text **Name:** just before variable text **first_name** and **last_name** fields.

For more information on field codes and data codes that you can use in text objects, see the *PowerSchool Data Access Tags Supplement* guide, available on PowerSource.

How to Create Text Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Text**. The New Text Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Object Label	Enter a name for the object.

Text	Enter an unlimited amount of text to include in the text object. In addition to standard text, you can include HTML tags, PowerSchool fields and PowerSchool data codes. Since text does not automatically wrap to the next line, use carriage (hard) returns. To create a carriage return, press and hold COMMAND (Mac) or CONTROL (Windows) and then press the space bar. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes, and the selected field appears. For example, to include each student's name on the report and center the information, create the following text object: **<center>^(first_name) ^(last_name)</center>** To include a tab, indicate the tab type and the number of inches from the left side of the page. Tab types include: • <tabc> for a centered tab • <tabr> for a right-justified tab • <tabl> for a left-justified tab • <tabd> for a decimal-aligned tab Create tab leaders by using characters such as the underscore (_) for a solid line or a period (.) for a dotted line. Include tab leader characters at the end of the tab tag. For example, **<tabd 3.5 _>** aligns a list of monetary amounts by their decimal places with a solid tab leader at 3.5 inches from the left side of the page. To include a data code, use the following format: ^(*data code) For example, to include each student's cumulative GPA, enter: **^(*gpa)**

	Note: If you are adding database extension fields, enter the extension field name using the format [extension name].[fieldname]. **Note:** After you save this object, the system changes the carets (^) in front of the field names and data codes to tildes (~).
Position	Enter the number of inches from the left margin that the text object should appear horizontally (X) and vertically (Y). For example, enter **4.25** in the X field and **1** in the Y field to place the object horizontally centered on an 8.5-inch page and vertically one inch from the top of the page.
Max Width	Enter the maximum number of inches wide you want this text object to print (optional). To allow the text object to print the entire width of the page, enter **0**. If you do not define a maximum width, the system defaults to the page width.
Max Height	Enter the maximum number of inches high you want this text object to print. To allow the text object to print the entire length of the page, enter **0**.
Font	Choose the font of the text from the pop-up menu. The system setup determines the default font. Select the style of the font from the second pop-up menu.
Style	Select any combination of these checkboxes to determine any additional styles for the text in the Text field: • **Bold** • **Italic** • **Underline**

Size	Enter the font size of the text in points. One point equals 1/72 of an inch.
Line Height	Enter the height of the line in points. One point equals 1/72 of an inch. The line height determines the amount of space for each line of text in the object. For example, if you increase the line height, you create more space or padding between each line of text.
Color	Enter the name of the color in which you want all text in the text object to print. To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. If you want the text to be black, leave this field blank.
Tint	To adjust the tint of the color of the text, enter a percentage. Otherwise, leave this field blank.
Rotation	Enter the number of degrees to rotate the text object on the page of the report.
Frame Width	To have the report surround the text object with a line frame, enter the number of points wide you want the frame to print. One point equals 1/72 of an inch. If you do not want the text object to print with a frame, leave this field blank.
Frame Padding	If you entered a frame width, enter the amount of space in points between the text object and the frame. One point equals 1/72 of an inch. For example, to have the text object print in the center of the frame, you need to adjust the padding.

Frame Radius	If you entered a frame width, enter a number of inches to print the frame with rounded corners. The higher the number, the more rounded the frame.
Special	Select the **Move to next record after printing this text** checkbox if this text object is the last object the report prints before printing a new record. Deselect the checkbox if this is the last object on the page (the last record to be printed), such as a footer. **Note:** If the text object is a footer or any other object that should be printed last, deselect the checkbox. Also, the order of objects is determined by the object layer (lower layers are listed first) and alphabetically by object name. By either placing the footer object at a lower layer or altering its name so that it falls before other objects that may repeat (such as a list of students), the report should print correctly.
Page	Do one of the following: • Enter the page number of the report on which you want this text object to print. • Select the **Display this object on all pages** checkbox to have this text object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the text object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit** to save the text object. The Changes Recorded page appears. When you print the report, the text object prints according to your specifications. If the text object does not print correctly, edit it by clicking the object name on the Object Report page and repeating the procedure.

Note: For example, assume a student does not have a Social Security number. By default, the text box prints one blank space, then prints the birth date text directly next to it (SS# BIRTH DATE: 9/2/1984). If this causes alignment concerns in your text box, you can use the <TABTO (inches)> HTML tag in your text object. Within the tag, before the text you want to print in a specific space, enter the number of inches from the left margin that you want to print the text. For example, if a student does not have a Social Security number, but you still want the birth date to print 2.25 inches from the left margin, you can enter: **SS# ^(ssn)<TABTO 2.25>^BIRTH DATE: ^(dob)**.

Line Objects

Create line objects to include horizontal and vertical lines on your object report. Lines can separate information and make it easier to read. For each line you create, you define the location, thickness, and number of times it appears.

Define line objects as if they were printing on a graph. For each line, you define the X and Y coordinates in inches. The X coordinate is the horizontal point from the left margin at which you want the line to print. The Y coordinate is the vertical point from the top margin at which you want the line to print.

Note: If the line is horizontal, the number you enter for the starting and ending Y points are the same. If the line is vertical, the number you enter for the starting and ending X points are the same.

How to Create Line Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Line**. The New Line Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Object Label	Enter a name for the line object.

<table>
<tr><td>Starting point (X,Y)</td><td>Enter the number of inches on the page to indicate the point at which you want the report to start the line horizontally (X) and vertically (Y).</td></tr>
<tr><td>Ending point (X,Y)</td><td>Enter the number of inches on the page to indicate the point at which you want the report to end the line horizontally (X) and vertically (Y).</td></tr>
<tr><td>Width</td><td>Enter the width of the line in pixels. A pixel is a single point in a graphic image.</td></tr>
<tr><td>Color</td><td>Enter the name of the color in which you want the line to print.

To view a list of color names, click Color. A color palette appears. Copy the name of the color you want and paste it into the Color field.

If you want the line to be black, leave this field blank.</td></tr>
<tr><td>Tint</td><td>To tint the color of the line, enter a percentage. The higher the number, the darker the tint.

Otherwise, leave this field blank.</td></tr>
<tr><td>Repeat</td><td>If you want the line to print more than one time, enter information in the following fields:
Times to Repeat
Horizontal Change (enter the number of inches you want between each line horizontally)
Vertical Change (enter the number of inches you want between each line vertically)
Otherwise, leave these fields blank.</td></tr>
<tr><td>Line Style</td><td>Select one of the options to indicate the style of the line.</td></tr>
<tr><td>Page</td><td>Do one of the following:</td></tr>
</table>

	• Enter the page number of the report on which you want this line object to print. • Select the **Display this object on all pages** checkbox to have this line object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the line object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit**. The Object Report page appears. When you print the report, the line object prints according to your specifications.

Box Objects

Create box objects to include on your object report. These objects frame or shade information on the report.

How to Create Box Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Box**. The New Box Object page appears.
6. Use the following table to enter information in the fields:

Field	**Description**

Object Label	Enter a name for the box object.
Coordinates	To determine where the box prints on the page, enter the number of inches from the left, top, right, and bottom margins you want the box to print.
Line width (frame)	To print a frame around the box, define the width of the line and the percentage the line is shaded in points. One point equals 1/72 of an inch.
Line Color	Enter the name of the color in which you want the line that prints around the box to print. To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. If you want the line to be black, leave this field blank.
Line Tint	To tint the color of the line, enter a percentage. Otherwise, leave this field blank.
Corner Radius	Enter a number to indicate how round you want the corners of the box to be in inches. The greater the number, the rounder the corners.
Fill Color	To shade or color inside the box, enter the name of the color. To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. To view a list of color names, click the field name Color.
Fill Tint	To tint the fill color of the box, enter a percentage. Otherwise, leave this field blank.
Repeat	If you want the box to print repeatedly, define information in the following fields:

	• **Times to Repeat** • **Horizontal Change** (enter the number of inches you want between each box horizontally) • **Vertical Change** (enter the number of inches you want between each box vertically)
Rotation	To rotate the box on the report, enter the number of degrees you want it to rotate.
Line Style	Select one of the options to indicate the style of the line that surrounds the box object.
Page	Do one of the following: • Enter the page number of the report on which you want this box object to print. • Select the **Display this object on all pages** checkbox to have this box object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the box object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit**. The Object Report page appears. When you print the report, the box object appears according to your specifications.

Circle Objects

Create circle objects to include on your object report. These objects can encircle information or images on the report.

How to Create Circle Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Circle**. The New Circle Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Object Label	Enter a name for the circle object.
Center Point	Enter the number of inches from the left margin you want the center point of the circle to print horizontally (X) and vertically (Y).
Radius	Enter the circle's radius, or the distance from the center of the circle to its edge.
Line Width	To print a frame around the circle, define the width of the line.
Line Color	Enter the name of the color in which you want the line around the circle to print. To view a list of color names, click **Color**. If you want the line to be black, leave this field blank.
Line Tint	To tint the line, enter a percentage. Otherwise, leave this field blank.
Fill Color	To shade or color inside the circle, enter the name of the color. To view a list of color names, click **Color**.
Fill Tint	To tint the fill color of the circle, enter a percentage. Otherwise, leave this field blank.

Starburst Points	To create a starburst circle, enter the number of points on the star. For example, you might create a starburst as a "seal" for a perfect attendance certificate.
Starburst Radius	If you entered starburst points, enter the radius of the starburst in inches.
Repeat	If you want the circle to print repeatedly, define information in the following fields: • Times to Repeat • Horizontal Change (enter the number of inches you want between each circle horizontally) • Vertical Change (enter the number of inches you want between each circle vertically)
Rotation	To rotate the circle on the report, enter the number of degrees you want it to rotate.
Line Style	Select one of the options to indicate the style of the line that surrounds the circle object.
Page	Do one of the following: • Enter the page number of the report on which you want this circle object to print. • Select the **Display this object on all pages** checkbox to have this circle object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the circle object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu.

7. Click **Submit** to save the circle object. The Object Report page appears. When you print the report, the circle object appears according to your specifications.

Transcript Objects

Create transcript objects to include a list of student historical grades and the courses in which students received the grades on your object report. By default, within a transcript object, the system lists historical grade information in chronological order and displays the most recent first.

Note: The option to create Legacy Transcript List objects is no longer available. However, existing legacy transcript list objects may be used for object reports. Use the new Transcript object for object reports going forward. To create new transcript objects, use **Transcript**, which is also available on the Object Reports page.

Note: If a course appears but is not desired on a report card or transcript-based object report, change the course preferences to Exclude on Report Cards/Transcripts. For more information, see *New Courses*.

How to Add a Transcript Object

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of object report for your school.
4. Click the name of the object report to which you want to add a transcript object. The Object Report [Report Name] page appears.
5. Under New Object, click **Transcript**. The New Transcript Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Define the box that contains the transcript course listing	Enter the coordinates of the box in which the transcript information prints. Use inches as the unit of measurement. Determine how many inches from the top left of the page you want the transcript object to print. Indicate the left, top, right, and bottom coordinates of the transcript object.

If listing overflows this object, start a new column with these margins	If the listing requires more room on the report, enter the coordinates of the box in which the overflow transcript information prints. Use inches as the unit of measurement. Determine how many inches from the top left of the page you want the overflow transcript object to print. Indicate the left, top, right, and bottom coordinates of the transcript object.
Term/school name font	Choose the font in which the term and school information prints from the pop-up menu.
Size, line height, style	In the first field, enter the size of the font. In the second field, enter the height of each line in the object in points. One point equals 1/72 of an inch. The height determines the space between each line in the transcript. Select any combination of these checkboxes to determine any additional styles for the text: • **Bold** • **Italic** • **Underline**
Term/school displays	Choose from the pop-up menu whether to print the year, the school name, or both.
Course listing font	Choose from the pop-up menu the font in which the transcript information prints.
Size, line height, style	In the first field, enter the size of the font. In the second field, enter the height of each line in the object. One point equals 1/72 of an inch. The height determines the space between each line in the transcript. Select any combination of these checkboxes to determine any additional styles for the text: • **Bold** • **Italic**

	• **Underline**
Cell padding	Enter a number, in points, to determine the distance between the horizontal and vertical borders of the cell and its contents. One point equals 1/72 of an inch.
Columns	Specify the following for each column: In the **Term** field, enter the store codes (terms) you want to include in the transcript. The report prints historical grade information for only the term columns you define, such as **S1** and **S2**. From the **Field** pop-up menu, select one of the following fields to include in the column: • **Blank** • **Course Name** • **Course Number** • **Total Earned Credit** and enter the format in which you want total earned credit to print in the **Other Field/Text/Format** field. • **Letter Grade** • **Percent** and enter the format in which you want percent to print in the **Other Field/Text/Format** field. • **Citizenship** • **Earned Credit Hours** and enter the format in which you want credit hours to print in the **Other Field/Text/Format** field. • **Replaced Grade** and enter the grade indicator you want to print in the **Other Field/Text/Format** field. To display an indicator for grades that are replaced, enter **R**. To display an indicator for grades that are suppressed because they were over the maximum credit hours for the course, enter **M**. Use a comma to separate multiple grade indicators. Do not include blank spaces between the comma and the grade indicator. For more information, see *Repeated Course Grade Suppression Process*. • **Other** and enter what you want to print in this column in the **Other Field/Text/Format** field.

	In the **Other Field/Text/Format**, enter any additional field or text you want to print next to each course. If you enter a PowerSchool field name, use the following format: ^(field name). For example, to include the possible credit a student could earn in each course, you can include the potential credit field. In the **Width** field, enter the width, in inches, of each term column. From the **Align** pop-up menu, select whether to align the data to the left, center, or right of the column.
Include only historical grades from these grade levels	To print historical grades for only certain grade levels in the transcript, enter the range of grade levels. Otherwise, leave these fields blank.
Restrict to this credit type	To print only courses with a specific credit type in this transcript object, enter the credit type. By default, within a transcript, the system sorts course information chronologically, displaying the most recent courses first. If you would rather sort the transcript by courses with the same credit type (courses within the same subject, such as English, Mathematics, and Science), enter the credit type here. Then, you can create a transcript object for each credit type. Otherwise, leave this field blank. When using this option to filter grades by credit type, the Transcript Object will only include historical grades that meet one of the following criteria: • The historical grade must have the same credit type in the [StoredGrades]Credit_Type field. • If an historical grade does not have a value in [StoredGrades]Credit_Type, The grade may still be included if the value in [StoredGrades]Course_Number is related to a course with the specified credit type.
Exclude blank grades?	Select the checkbox if you do not want to display courses for which the student did not receive a grade. For example, if your

	school schedules lunch as a course on student schedules, select the checkbox to not print lunch on student transcripts.
Include current grades?	Select the checkbox to include grades for the current term in the transcript. Otherwise, deselect the checkbox.
Current school only?	Select the checkbox to include grades for only the current school in the transcript. Otherwise, deselect the checkbox.
Override "Exclude from Transcripts" Historical Grade setting?	If the **Exclude from Transcripts?** setting on the Edit Stored Grades page is set to **Exclude**, you can use this checkbox to override that setting. Select the checkbox to include stored grades for the current term in the transcript. Otherwise, deselect the checkbox.
Sort grades by	Use this pop-up menu to determine the sort order of the grades in the transcript: • **Course Name**: Results descend by school year, then ascend by school name, and then ascend by course name. • **Course Number**: Results descend by school year, then ascend by school name, and then ascend by course number. • **Credit Type**: Results descend by school year, then ascend by school name, credit type, and course name. • **Ascending by grade level, then course number**: Results ascend by grade level, then school year, then school name, and then course number.
Page	Do one of the following: • Enter the page number of the report on which you want this transcript object to print. • Select the **Display this object on all pages** checkbox to have this transcript object print on all pages of the report. Note the **Page** field appears as **All**.

	Note: As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the transcript object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit**. The Changes Recorded page appears. When you print the report, the transcript object prints according to your specifications.

How to Edit a Transcript Object

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of object report for your school.
4. Click the name of the object report for which you want to edit a transcript object. The Object Report [Report Name] page appears.
5. In the Object Type column, click **Transcript** of the transcript object you want to edit. The Edit Transcript Object page appears.
6. Edit information as needed. For field descriptions, see *How to Add a Transcript Object*.
7. Click **Submit**. The Changes Recorded page appears. When you print the report, the transcript object prints according to your specifications.

How to Delete a Transcript Object

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of object report for your school.
4. Click the name of the object report for which you want to delete a transcript object. The Object Report [Report Name] page appears.

5. In the Object Type column, click **Transcript** of the transcript object you want to delete. The Edit Transcript Object page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.
8. Click **Back** to return to the Object Report [Report Name] page.

Fee List Objects

Include fee list objects on object reports. For example, include a fee list object to display course fee information per student.

Note: Fee search codes are designed for searches only. For more information, see *How to Search for Students by Fees/Transactions*.

How to Use Fee List Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Fee List**. The New Fee List Object page appears.
6. Enter the name of the fee list object in the Object Label field.
7. Use the following table to enter List Settings information:

Field	Description
Only these fee categories	Select the fee categories by which you want to limit your report parameters. Only those fee categories for your school appear.
Only these departments	Select the departments by which you want to limit your report parameters. Only those departments for your school appear.
Only fees assessed for courses in these groups	Select the groups by which you want to limit your report parameters. Only those groups for your school appear.

Only fees assessed during	Choose the date range by which you want to limit your query from the pop-up menu: • **Current School Year** • **Current Term** • **Current Date** • **Date Range:** If you select the Date Range, enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Only fees whose current balance is	Select the type of balance by which you want to limit your report parameters. Choose one of the following from the pop-up menu: • **Paid in Full** • **Partially Paid** • **Non-Zero**
Only transactions conducted during	Choose the date range by which you want to limit your query from the pop-up menu: • **Current School Year** • **Current Term** • **Current Date** • **Date Range:** • **Specify a Run Time** If you select the Date Range or Specify a Run Time, enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

Only transactions paid via	Select the payment methods by which you want to limit your report parameters. Only those payment methods for your school appear.
Only transactions which are	Select the type of transaction by which you want to limit your report parameters. Choose one of the following from the pop-up menu: • **Debits** • **Credits**

8. Use the following table to enter Table Settings information:

Field	**Description**
Column title font	Choose the style of font you want the column title to appear as from the pop-up menu. The system setup determines the default font. If selecting a font other than the default, you may also select the formatting you want to use. For example, choose **Bold** to bold the column title font.
Size, line height, size	Enter the column title font size and line height in points. One point equals 1/72 of an inch. Select any combination of these checkboxes to determine any additional styles for the text: • **Bold** • **Italic** • **Underline**
Column Title Background Color, Tint	Enter the name of the color in which you want the background of the column title to appear. To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. Otherwise, leave this field blank.

	To tint the color, enter a percentage. Otherwise, leave this field blank.
Print column titles on	Choose which pages you want column titles to appear from the pop-up menu: • **All pages** • **First page of list** • **Do not print column titles**
Print subtotal row on	Choose whether or not you want the subtotal row to appear from the pop-up menu: • **Last page of line items** • **Do not print subtotal row**
Subtotal row label	If you selected to print a subtotal row on the last page of line items, enter the heading you want to appear. Then, choose the row in which you want the heading to appear from the pop-up menu.
Print grand total row on	Choose whether or not you want the grand total row to appear from the pop-up menu: • **Last page of this fee list** • **Do not print grand total row**
Grand total row label	If you selected to print a grand total row on the last page of this fee list, enter the heading you want to appear. Then, choose the column in which you want the heading to appear from the pop-up menu.
Coordinates	To determine where the table prints on the page, enter the number of inches from the left, top, right, and bottom margins you want the table to print.

Rule width	Enter the thickness in points of the vertical and horizontal lines on the report, as well as the outline of the entire report. One point equals 1/72 of an inch.
Cell padding	Enter the width of each cell and the amount of space from all sides of the cells to the text in points. One point equals 1/72 of an inch.

9. Use the following table to enter Line Item Settings information:

Field	**Description**
Font	Choose the style of font you want the column title to appear as from the pop-up menu. The system setup determines the default font. If selecting a font other than the default, you may also select the formatting you want to use. For example, choose **Bold** to bold the column title font.
Size, line height, style	Enter the column title font size and line height in points. One point equals 1/72 of an inch. Select any combination of these checkboxes to determine any additional styles for the text: • **Bold** • **Italic** • **Underline**
Even row background color, tint	Enter the name of the color in which you want the backgrounds of the even rows to appear. To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. Otherwise, leave this field blank. To tint the color, enter a percentage. Otherwise, leave this field blank.

Odd row background color, tint	Enter the name of the color in which you want the backgrounds of the odd rows to appear. To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. Otherwise, leave this field blank. To tint the color, enter a percentage. Otherwise, leave this field blank.
Currency format	Choose the format by which you want currency to appear from the pop-up menu.
Group line items by	Choose the way in which you want line items to be grouped from the pop-up menu: • **Individual Fees** • **Individual Transactions** • **Fee Category** • **Fee Type** • **Payment Method** • **Course Number**

10. Use the following table to enter information for each column you want to include:

Field	**Description**
Width	Enter the width of the column in inches.
Title	Enter the text you want to appear as the heading for the column.
Title alignment	Choose the column title justification from the pop-up menu: • **Left** • **Center** • **Right**

Data Source	Choose from the pop-up menu the type of data you want to include in this column: • **Fee Balance** • **Fee Amount** • **Transaction Quantity** • **Transaction Payment Amount** • **Blank** • **Static Text** • **Field value:** If you selected a data source of **Static Text** or **Field Value**, enter the static text or field value you want to display in the next field.
Specific fee type	Choose the fee type from the pop-up menu. For more information about fee types, see *Fee Types*.
Data alignment	Choose the data justification from the pop-up menu: • **Left** • **Center** • **Right**
Include in	Select one of the checkboxes: • Select **Subtotal** to include this column in subtotal calculations. • Select **Grand total** to include this column in grand total calculations.

11. Use the following table to enter Page Item Settings information:

Field	**Description**
Split line items to multiple pages	Select one of the following checkboxes to group information by page based on your selection:

	• **By fee category** • **By department** • **By transaction date** • **By receipt number**
Page	Do one of the following: • Enter the page number of the report on which you want this fee list object to print. • Select the **Display this object on all pages** checkbox to have this fee list object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the fee list object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

12. Click **Submit**. The Changes Recorded page appears. When you print the report, the fee list object appears according to your specifications.

Picture Objects

Use picture objects to include on your object report. For example, include on transcripts a picture of your school's logo.

Note: Before creating a picture object, you must add the picture to your PowerSchool system. For more information about adding pictures, see *Report Pictures*.

How to Use Picture Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.
4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Picture**. The New Picture Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Object Label	Enter a name for the picture object.
Picture	Choose an available picture from the pop-up menu. To print the appropriate student or teacher photos, choose **Student Photo** or **Teacher Photo**. **Note:** If a student or teacher record does not include an uploaded photo, nothing will appear on the report where this object is positioned.
Coordinates	Enter the number of inches you want the picture to print from the left, top, right, and bottom margins.
Scaling Option	To shrink or stretch the picture to fit within the specified coordinates, choose a scale from the pop-up menu. **Note:** Scaling can distort the display of the pictures.
Rotation	To rotate the picture on the report, enter the number of degrees you want to rotate it.
Repeat	If you want the picture to print repeatedly, define information in the following fields: • **Times to Repeat** • **Horizontal Change** (enter the number of inches you want between each picture horizontally)

	• **Vertical Change** (enter the number of inches you want between each picture vertically)
Page	Do one of the following: • Enter the page number of the report on which you want this picture object to print. • Select the **Display this object on all pages** checkbox to have this picture object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the picture object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit**. The Object Report page appears. When you print the report, the picture object appears according to your specifications.

Sequence Objects

Include sequence objects to print a numbered sequence on an object report. The sequence object is designed to mimic a counter on a preprinted form. For example, use a sequence object on a scheduling form to track each form by its number in the sequence. Use only numbers for a sequence object and use a maximum of one sequence object per object report.

How to Use Sequence Objects

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of any object report templates created for your school.

4. Click the name of the object report to which you want to add this object. The Object Report page appears.
5. Click **Sequence**. The New Sequence Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Object Label	Enter a name for the sequence object.
Position	Enter the position of the sequence object for the X (horizontal) and Y (vertical) axes.
Font	Choose a font for the sequence object from the pop-up menu.
Style	Select any combination of the following checkboxes to determine the style of the font: • **Bold** • **Italic** • **Underline** Otherwise, do not select any checkboxes.
Size	Enter the font size in points. One point equals 1/72 of an inch.
Starting Number	Enter the first number in the sequence object.
Count Forward?	Select the checkbox if the sequence is in ascending order, such as 1, 2, and 3. To use descending order, deselect the checkbox.
Format String	This is used to format the printed output of the sequence object. For example, if you enter a starting number of **10** and a format string of **00000**, the first item prints as 00010.
Color	Enter the name of the color in which you want all text in the sequence object to print.

	To view a list of color names, click **Color**. A color palette appears. Copy the name of the color you want and paste it into the Color field. If you want the text to be black, leave this field blank.
Tint	Enter a percentage to determine the shade of the sequence list object. If you enter 100%, the object is black. If you enter 0%, the object is white. Therefore, you can enter percentages between 100 and 0 to create a darker or lighter object.
Page	Do one of the following: • Enter the page number of the report on which you want this sequence object to print. • Select the **Display this object on all pages** checkbox to have this sequence object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the sequence object will continue to appear on the first page of the report.
Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit**. The Object Report page appears. When you print the report, the sequence object appears according to your specifications.

Standards Objects

Create standard objects to include standards grades for each course.

How to Add a Standard Object

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of object report for your school.
4. Click the name of the object report to which you want to add a standard object. The Object Report [Report Name] page appears.
5. Under New Object, click **Standard**. The New Standard Object page appears.
6. Use the following table to enter information in the fields:

Field	Description
Define the box that contains the standard course listing	Enter the coordinates of the box in which the standard information prints. Use inches as the unit of measurement. Determine how many inches from the top left of the page you want the standard object to print. Indicate the left, top, right, and bottom coordinates of the standard object.
If listing overflows this object, start a new column with these margins	If the listing requires more room on the report on the same page, enter the coordinates of the box in which the overflow standard information prints. Use inches as the unit of measurement. Determine how many inches from the top left of the page you want the overflow standard object to print. Indicate the left, top, right, and bottom coordinates of the standard object.
Term/school name font	Choose the font in which the term and school information prints from the pop-up menu. **Note:** Click on the font link to view a list of available font examples.
Size, line height, style	Enter the information for the term/school name display on the report. In the first field, enter the size of the font. In the second field, enter the height of each line in the object in points. One point equals 1/72 of an inch. The height determines the space between each line in the standard.

	Select any combination of these checkboxes to determine any additional styles for the text: • **Bold** • **Italic** • **Underline**
Term/school displays	Choose from the pop-up menu whether to print the year abbreviation, the school name, both the school name and year abbreviation, or to leave this information off of the report.
Course listing font	Choose from the pop-up menu the font in which the standard information prints. **Note:** Click on the font link to view a list of available font examples.
Size, line height, style	Enter the information for the course listing on the report. In the first field, enter the size of the font. In the second field, enter the height of each line in the object. One point equals 1/72 of an inch. The height determines the space between each line in the standard. Select any combination of these checkboxes to determine any additional styles for the text: • **Bold** • **Italic** • **Underline**
Cell padding	Enter a number, in points, to determine the distance between the horizontal and vertical borders of the cell and its contents. One point equals 1/72 of an inch.
Horizontal Separator Width	Enter the pixel width of the separator border between rows. Here is an example of the conversion from pixels to point sized for the border:

	1 px = **0.75** point **2** px = **1.5** point **3** px = **2.25** point **4** px = **3** point **5** px = **3.75** point **6** px = **4.5** point
Horizontal Separator Color	Enter the color you want for the separator border between rows. Leave the field blank to use a black border. To use a named color, click on the **Horizontal Separator Color** link to view a list of the colors available. You can copy a color name from the page and paste it in to the Horizontal Separator Color field. You can also enter an HTML color code directly in the field. Be sure to include the # symbol in the HTML color code when you enter it in the field.
Horizontal Separator Tint	If you want the separator border to be a gradient of the color you selected, enter the percentage. The lower the number, the lighter the color will appear.
Horizontal Separator Line Style	Select the line style for the separator border.
Columns	Specify the following for each column: In the **Term** field, enter the store codes (terms) you want to include in the standard. The report prints historical grade information for only the term columns you define, such as **S1** and **S2**. The first six columns are pre-populated with the most commonly used objects. It is important to first list the course name, followed by the Start a New Line field. The items after the new line will repeat within the course name. For example, it will list a single course, then all of the standards assigned to that course. The new line helps to differentiate the spacing of the standards and the course name itself. This allows the standards to appear all under the same course.

	To change or add new fields, from the **Field** pop-up menu, select one of the following fields to include in the column: • **Blank** • **Start a New Line to insert a line break.** • **Course Name** • **Course Number** • **Standard Name** • **Standard Identifier** • **Section Number** • **Section Expression** • **Letter Grade** • **Percent** and enter the format in which you want percent to print in the **Other Field/Text/Format** field. In the **Other Field/Text/Format**, enter any additional field or text you want to print next to each course. If you enter a PowerSchool field name, use the following format: ^(field name). For example, to include the possible credit a student could earn in each course, you can include the potential credit field. In the **Width** field, enter the width, in inches, of each term column. From the **Align** pop-up menu, select whether to align the data to the left, center, or right of the column. **Note:** For special formatting around course names and/or standard names, you can hard-code the course names or the standard name on the report. Then, in the Standards object, do not include a row for the course name, or don't include the standard name in the object. To check the alignment of the special formatting, run the report once with standard name included, then remove it when the alignment is verified.
Include only standard grades from these grade levels	To print standard grades for only certain grade levels in the standard, enter the range of grade levels. Otherwise, leave these fields blank.

Exclude Standards with No Grades?	Select the checkbox if you do not want to display courses for which the student did not receive a grade. For example, if your school schedules lunch as a course on student schedules, select the checkbox to not print lunch on student standards.
Filter to Specific Standards	Use the fields to filter the report to specific standards. • Only include standards starting with the following text Enter a word in the text box and select **Standard Name** or **Standard Identifier** from the pop-up menu. For more information, see *Standard Object Filter Examples*. • Only include standards with these identifiers Enter values. Separate each value entered with a comma. For more information, see Standard Object Filter Examples. • Only include standards at these hierarchy levels Enter values in the text boxes. For example, enter 1 and 3 to view standards between levels **1** through **3**. • Only include standards with the following subject areas Enter the subject areas for the standards you want to view. Separate each value entered with a comma. For example; enter **history**, **math**, **language arts**.
Show Additional Data (Usually Excluded)	Select the checkbox next to the filter option you want included in the report.
Current school only?	Select the checkbox to include grades for only the current school in the standard. Otherwise, deselect the checkbox.

Current year only?	Select the checkbox to include grades for only the current year in the standard. Otherwise, deselect the checkbox.
Sort courses by	Use this pop-up menu to determine the sort order of the courses in the standard grades listing: • **Course Name**: Results descend by school year, then ascend by school name, and then ascend by course name. • **Course Number**: Results descend by school year, then ascend by school name, and then ascend by course number.
Sort standards by	Use this pop-up menu to determine the sort order of the standards: • **Standard Name**: Results descend by school year, then ascend by school name, and then ascend by standard name. • **Standard Identifier**: Results descend by school year, then ascend by school name, and then ascend by standard identifier.
Page	Do one of the following: • Enter the page number of the report on which you want this standard object to print. • Select the **Display this object on all pages** checkbox to have this standard object print on all pages of the report. Note the **Page** field appears as **All**. **Note:** As of PowerSchool 11.0.4.0, only numeric values may be entered in the **Page** field. If an alphanumeric value was entered prior to PowerSchool 11.0.4.0, that value will be honored, and the standard object will continue to appear on the first page of the report.

Layer	If you want this object to appear behind or in front of another object, choose the layer placement from the pop-up menu. Choose the highest number to place the object in front of all other layers.

7. Click **Submit**. The Changes Recorded page appears. When you print the report, the standard object prints according to your specifications.

   Note: The Course Name and Standards name fields are not required to be printed by this object. Some customers may want to hard code those on the report to include special formatting, grid lines, and other items. This is especially useful when using multiple standards objects on the report and using the filters to limit which standards appear in each area. In that case, you can hard code the names on the report, and remove them from this object. Be sure to test the alignment first by including the standards or course names from the object to line up the report, then remove them once you have correctly lined up the objects.

How to Edit a Standard Object

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of object report for your school.
4. Click the name of the object report for which you want to edit a standard object. The Object Report [Report Name] page appears.
5. In the Object Type column, click **Standard** of the standard object you want to edit. The Edit Standard Object page appears.
6. Edit information as needed. For field descriptions, see *How to Add a Standard Object*.
7. Click **Submit.** The Changes Recorded page appears. When you print the report, the standard object prints according to your specifications.

How to Delete a Standard Object

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Object Reports**. The Object Reports page displays the list of object report for your school.

4. Click the name of the object report for which you want to delete a standard object. The Object Report [Report Name] page appears.
5. In the Object Type column, click **Standard** of the standard object you want to delete. The Edit Standard Object page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.
8. Click **Back** to return to the Object Report [Report Name] page.

Standard Object Filter Examples

Report Type	Filter Field	Data Entry
Elementary Report Card	Only include standards with these identifiers	Enter **MATH1.1.1**, **MATH1.1.2**, **MATH1.1.3**, **MATH1.1.4**, **MATH1.1.5**, **MATH 1.1.6**, **MATH 1.1.7** to view these exact standards on the report.
Middle School/High School Report Card	None	To display each student's full schedule and standards for their classes, do not include filters.
Life Science Standard	Only include standards starting with the following text	Enter **Life Science** and select **Standard Name** from the pop-up to view only that standard on the report.

Report Pictures

Include pictures on object reports to enhance their appearance. Pictures like logos and seals are useful for object reports such as transcripts. For more information about adding pictures to a report, see *Objects on an Object Report*.

To make pictures available to include in reports, you must first upload the picture files to your server.

How to View a Report Picture

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Pictures**. The Pictures page appears.
4. Click the name of the picture in the "Available pictures" field. The picture appears.

How to Add a Report Picture

Add a report picture for use in object reports. All pictures must be saved as JPEG files with the filename extension .jpg.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Pictures**. The Pictures page appears.
4. Either enter the file path and name of the picture in the "Upload a new picture" field or click **Browse...** to search for and select the file.
5. Click **Submit**. The Pictures page displays the new picture file name in the "Available pictures" field.

How to Delete a Report Picture

To save system space and minimize possible confusion, delete a report picture when it is no longer needed. For example, delete a picture when your school logo changes. Then, add the picture of the new logo. For more information about adding pictures, see *How to Add a Report Picture*.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Pictures**. The Pictures page appears.
4. Select the checkbox next to the picture you want to delete.
5. Click **Submit**. The Pictures page appears without the deleted picture in the "Available pictures" field.

Object Reports With Standards Grades

Object reports can display standards scores. Use the following list of codes to generate object reports with standards grades.

Current Standard

~(*std.[which];[identifier])

For example:

~(*std.avg;LA11.2.3)

~(*std.transhigh;M12.4.5)

~(*std.num;FL3)

Calculated Standard

~(*std.[which];[identifier];[request1]{;[request2]})

For example:

~(*std.transavg;LA11.2.3;8/1/2000;7/30/2001)

~(*std.avg;SC3.5.12;Q1,Q2)

~(*std.high;FL2.5;2,3,4;S1)

~(*std.num;FA5.12;1999)

Stored Standard

~(*std.stored.[which];[identifier];[storecode]{;[request]})

For example:

~(*std.stored.transavg;LA11.2.3;S1)

~(*std.stored.avg;SC3.5.12;Q4)

~(*std.stored.high;FL2.5;T1;1999)

~(*std.stored.num;FA5.12;S2;11)

For which the following can have 'score' suffixed (for example, averagescore):

- transhigh (translatedhigh)
- trans (transavg, translatedavg, translatedaverage)
- num (number, number, numberof)
- avg (average)
- high
- note (comment)

Standard Info

~(*std.info.[which];[identifier])

Which:

- name
- desc (description)
- level
- course (coursenumber, course_number)
- subj (subject, subjectarea)
- type
- id (identifier)
- alignmentid (alignidentifier, alignid)
- listparent
- calcparent (calculationparent)
- conv (convscale, conversionscale)

For example:

~(*std.info.name;LA11.2.3)

~(*std.info.desc;SC3.5.12)

~(*std.info.type;FL2.5)

Standard Info codes allow the parameter modification codes (for example, ;uppercase); however, the report codes do not.

Object Reports With Test Tags

Use test tags to include student test results in outputs. An output is a PDF file (such as an object report), an export, or an HTML page. For example, use the test tag when creating an object report text object. Enter the appropriate tags and supporting text in the Text field.

Test tags typically include several parameters to limit and format what appears on the report. For example, use the following test tag on a progress report to display a student's midterm test score:

~(tests;name=midterm;score=total;which=current)

You can also use the test tag inside an IF tag, which is a tag used to evaluate a given condition. For example, use an IF tag to display the statement "This student may wish to retake the ACT" on students' Graduation Progress pages if they earn ACT composite scores of less than 25.

In addition, you can add formats to the result of the test tag. The following is an example of a test tag that includes a type value, result value, and format string:

~(tests;name=ACT;score=math;which=last;type=num;result=value;format=##0.00)

The first three parameters refine the selection, and the next three parameters determine its presentation. If a student's last math ACT score was 23.14285, the result would be 23.14.

See the following table for parameter information.

Parameter	Examples	Notes
NAME	ACT SAT	No default. **Note:** NAME and SCORE are dependent upon tests defined on your PowerSchool system.
SCORE	MATH ENGLISH SCIENCE COMPOSITE	No default.
WHICH	FIRST LAST BEST CURRENT term TERMID GRADE	The default is LAST.
TYPE	NUM PERCENT ALPHA	The default is NUM.
RESULT	VALUE SUM AVG DATE COUNT	The default is SUM.

	MIN MAX	
FORMAT	[Format string]	

Some parameters are not compatible with others. For example, you cannot have a RESULT of SUM with a TYPE of ALPHA. Various combinations are detailed in the table below.

For example, the WHICH parameter TERM.CURRENT includes multiple tests. The RESULT parameter could meaningfully be set to SUM, AVG, COUNT, MIN, and MAX. A RESULT parameter of VALUE would not be meaningful and would return nothing.

See the following table to determine parameter compatibility; X indicates valid usage.

Which/Result	**SUM**	**AVG**	**COUNT**	**MIN**	**MAX**	**VALUE**
FIRST			X	X	X	X
LAST			X	X	X	X
BEST			X	X	X	X
TERM.CURRENT	X	X	X	X	X	
TERM.id	X	X	X	X	X	
DATES.mmddyy.mmddyy	X	X	X	X	X	
GRADE.number	X	X	X	X	X	
TYPE						
NUM	X	X	X	X	X	X
PERCENT	X	X	X	X	X	X
ALPHA			X			X

State Reports

PowerSchool provides an array of state-specific reports. For information about a report listed on the State tab, see *PowerSchool State/Provincial Reporting Online Help*.

State Reporting Platform Reports

You can schedule when you want specific State Reporting Platform (SRP) reports to run using the Scheduling options, available on the report detail page of all SRP reports. Once submitted, the report displays on the Scheduled Reports section of the ReportWorks Report Queue in PowerSchool.

Enterprise Reporting

PowerSchool Enterprise Reporting is a feature set within PowerSchool that allows users to access pre-built and ad hoc reports created using Oracle Application Express (APEX). From within the reporting area of PowerSchool users may access Enterprise Reports within report categories and access may be controlled using User Access Roles. Roles must be set, and Enterprise Reporting categories assigned to those roles for any Enterprise Reports to be available within PowerSchool. Please note that the reports delivered are for example purposes only and may need specific modification within the APEX Builder in order to work for your district or school.

In addition, administrative users will be able to control access to the APEX application outside of PowerSchool in order to create and share more Enterprise Reports within PowerSchool. Please note that there may be performance impacts when running these reports and data security should be considered when providing access to and distributing Enterprise Reports.

Setup

Assign Oracle Application Express Account (APEX)

Access to APEX may be granted to select PowerSchool users so that they are able to create queries and interactive reports to be published as Enterprise Reports within PowerSchool. Please note that users that are given permission to access the APEX Application Builder will have access to the full PowerSchool database. Therefore, only a limited number of highly trusted users should be given access to the APEX Application Builder in order to create reports.

How to Assign Application Access

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Applications** tab.
4. Select the **Oracle Application Express Account (APEX)** checkbox if you want this staff member to be able to sign in to the APEX Builder application.

   Note: To reset the password, deselect the checkbox, submit, and then re-select the checkbox.

Note: If this account has been locked in APEX, deselect the checkbox, submit, and then re-select the checkbox.

5. Use the following table to confirm and enter information in the APEX Settings section:

Field	Description
PowerSchool Username	The staff member's PowerSchool username.
First Name	The staff member's first name.
Last Name	The staff member's last name.
Email	The staff member's email address.
Password	Enter the staff member's password.
Confirm Password	Enter the staff member's password again.

6. Click **Submit**. A confirmation message appears.

Define Enterprise Reporting Settings for User Access Roles

Using the Enterprise Reporting tab on the Edit User Access Roles page, you can define which categories of Enterprise Reports published within PowerSchool a user can access. In addition, users assigned to this role may be granted permission to Manage Enterprise Reports, which allows them to view, add, edit, and remove new or existing Enterprise Reports from within PowerSchool. These access levels only apply to Enterprise Reporting.

How to Define Enterprise Reporting Settings for User Access Roles

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Click the name of the role you want to edit. The Edit User Access Role page appears.
5. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab appears.
6. Use the following table to enter information in the Settings section:

Field	Description
Manage Enterprise Reports	Do one of the following: • Select the checkbox to permit users assigned to this role to manage (view, add, edit, and delete) Enterprise Reports within PowerSchool. • Deselect the checkbox to prohibit users assigned to this role from managing (view, add, edit, and delete) Enterprise Reports. **Note:** If this checkbox is selected, all the **Allow User Access** checkboxes appear selected and shaded so that these users may manage all Enterprise Reports in all categories.
Enterprise Report Category	The name of each Enterprise Report Category: • Attendance • Discipline and Incidents • Enrollment • Grades • Health • Lists
Allow User Access	Do one of the following: • Select the checkbox in the header row to permit users assigned to this role to access (view and run) Enterprise Reports in all categories. • Deselect the checkbox in the header row to prohibit users assigned to this role to access (view and run) Enterprise Reports in all categories. • Select the checkbox next to an Enterprise Report Category to explicitly permit users assigned to this role to access (view and run) all reports within this Enterprise Report Category. • Deselect the checkbox next to an Enterprise Report Category to explicitly prohibit users assigned to this role to

	access (view and run) reports within this Enterprise Report Category. **Note:** If the **Manage Enterprise Reports** checkbox is selected, these checkboxes appear shaded.

7. Click **Save**. A confirmation message appears.

Provide SMTP Settings to Oracle Application Express

Enterprise Reports provides users with the ability to email individual reports or set up report subscriptions to be sent automatically. In order to enable, information about the SMTP server used by PowerSchool must be sent to APEX.

How to Provide SMTP Settings to Oracle Application Express

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Email**. The Email Setup page appears. By default the Email Setup tab appears selected.
4. Choose **Yes** from the **Provide SMTP Settings to Oracle Application Express** pop-up menu.

   Note: Alternatively, to withhold SMTP settings to Oracle Application Express, choose **No** from the pop-up menu.

5. Click **Submit**. A confirmation message appears.

Work with Enterprise Reporting

Enterprise Reporting provides the following six sample reports:

- Student Demographic
- Student Grades
- Student Attendance
- Student Incident
- Student Test
- YTD Absences by Grade

The reports delivered are for example purposes only and may need specific modification to the queries within the APEX Builder in order to work for your district or school. Users who have been granted access to the Application Builder in APEX can publish additional reports to PowerSchool Enterprise Reporting.

Access Enterprise Reporting

Using the Enterprise Reporting tab on the Reports page, you can access the various Enterprise Reports published within PowerSchool.

Note: Report access is based on your user access role.

How to Access Enterprise Reporting

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab displays the following pre-built reports appear:

Category	Reports
Attendance	Click **Student Attendance** to access the Student Attendance Report, which provides data from the Students, Schools, FTE, Attendance and Attendance_Code tables. Click **YTD Absences by Grade** to access a report displaying a chart of absences by grade as well as a related data grid, which provides data from the Students, Schools, FTE, Attendance and Attendance_Code tables.
Discipline and Incidents	Click **Student Incidents** to access the Student Incidents Report, which provides data from the Students, Schools, FTE and several Incident tables.
Grades	Click **Student Grades** to access the Student Grades Report, which provides data from the Students, Schools, FTE and StoredGrades tables. Click **Student Tests** to access the Student Tests Report, which provides data from the Students, Schools, FTE, Test, TestScores and StudentTestScores tables.

Lists	Click **Student Demographics** to access the Student Demographics Report, which provides data from the Students and Schools tables.

3. If a user is assigned to a role has permission to Manage Enterprise Reports, the following information also appears:

Field	Description
Add	Click to add an Enterprise Report.
Published	A green checkmark indicates that the report is published.
Action	Click the **Edit** icon (pencil) to edit an Enterprise Report. Click the **Remove** icon (minus sign) to edit an Enterprise Report.

How to Add an Enterprise Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab appears.
3. Click **Add**. The Add Report drawer opens.
4. Use the following table to enter information in the fields:

Field	Description
Report Name	Choose a report name from the pop-up menu.
Description	Enter a description for the report.
Category	Choose a report category from the pop-up menu.
State	Select one of the following options: • **Published** to publish the report, so that the report will be seen by users that have been granted access to that category.

	• **Not Published** to not publish the report, so that the report will only be seen by users that have been given permission to manage Enterprise Reports.

5. Click **Save**. The Add Report drawer closes, and a confirmation message appears.

How to Edit an Enterprise Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab appears.
3. Click the **Edit** icon (pencil). The Edit Report drawer opens.
4. Use the following table to edit information in the fields:

Field	Description
Report Name	The report name appears.
Description	Enter a description for the report.
Category	Choose a report category from the pop-up menu.
State	Select one of the following options: • **Published** to publish the report, so that the report will be seen by users that have been granted access to that category. • **Not Published** to not publish the report, so that the report will only be seen by users that have been given permission to manage Enterprise Reports.

5. Click **Save**. The Edit Report drawer closes, and a confirmation message appears.

How to Remove an Enterprise Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab appears.

3. Click the **Remove** icon (minus sign). The Remove Confirmation pop-up appears.
4. Click **Remove**. The Remove Confirmation pop-up closes, and a confirmation message appears.

How to Customize an Enterprise Report

Customize the layout on any report to view specific results.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab appears.
3. Click the name of the report you want to customize. The selected report appears in a new tab.
4. The following features are available to modify Enterprise Reports and the data displayed:

Field	**Description**
Set Current Selection	Choose **Set Current Selection** to make the students from the applied filter your current student selection. Choose **Add to Selection** to add students to your current selection.
Search	1. Enter search criteria in the search box. 2. Click the arrow next to the search icon to narrow your search to specific columns. Choose **All Columns** to search all columns. 3. Click **Go** to submit the search.
Report List	This list displays alternate default and saved private or public reports. Choose a report from the pop-up menu.
Rows	Select the number of rows to display on the page from the pop-up menu.
Actions	Select an option from the pop-up menu to customize the report: • **Select Columns** - Specify which columns to display and in what order.

	• **Filter** - Opens the Filter dialog, where you can specify filter options. • **Rows Per Page** - Select the number of rows to display on each page of the current report. • **Format** - Select a format option from the submenu. • **Flashback** - Select to view the data as it existed at a previous point in time. • **Save Report** - Select to save the report. • **Reset** - Select to reset the report back to the default settings. • **Help** - Select to open the Oracle online help for interactive reports. • **Download** - Select to download a report. Available download formats depend upon your installation and report definition. • **Subscription** - Select to send an interactive report by email.

5. To filter data on the report:
    a. Select the checkbox next to the filter name. Use the arrow to the left of the filter name to view or hide filter details.
    b. To edit a filter, click on the filter name.
    c. To remove a filter, click the **x** next to the filter name.

How to Generate an Enterprise Report

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Enterprise Reporting** tab. The Enterprise Reporting tab appears.
3. Click the name of the report you want to run. The selected report appears in a new tab.
4. Customize, if needed. For more information, see *How to Customize an Enterprise Report*.
5. Use the following table to edit information in the fields:

Field	Description
Rows	Use the pop-up menu to indicate the number of records you want to include in the report (up to a maximum of 100,000).

Action	1. Click and choose **Download**. The Download pop-up appears. 2. Click **PDF** or **CVS**. The report is downloaded to your Downloads folder. 3. Close the Download pop-up.

6. Close the tab.

Work with Oracle Application Express

Within APEX, the Application Builder module provides access to the pre-built Enterprise Reports delivered with PowerSchool, as well as the functionality to edit these reports and create new ones. Two pre-built applications are available within the Application Builder:

- Application 100, PowerSchool Enterprise Reporting, is reserved for you to save modified Interactive Reports and to create new ones.
- Application 200, PowerSchool Enterprise Reporting, is reserved for PowerSchool pre-built Interactive Reports now and going forward.

Note: All reports created or modified during the preview release of Enterprise Reporting should be imported back into Application 100, PowerSchool Enterprise Reporting.

Note: Only interactive reports created in APEX may be published to PowerSchool as Enterprise Reports. Websheet Applications, Forms, and other pages created in APEX may require read/write access, are not supported, and may not be published in PowerSchool.

In addition, all interactive reports to be published as Enterprise Reports within PowerSchool must use PS_APEX and not PS or any other Schema. PS_APEX provides secure access to PowerSchool data. Reports created using other schema will not be allowed to run from PowerSchool.

APEX is a full featured development environment. In order to learn more about APEX and how to create additional interactive reports that may be published to PowerSchool as Enterprise Reports, see *Oracle Application Express Documentation Release 5.0*, which contains several important user guides including, the *Application Express Application Builder User's Guide*, the *Application Express SQL Workshop Guide*, and the *Application Express End User's Guide*.

Access Oracle Application Express (APEX)

To access APEX, you must navigate to a specific URL outside of PowerSchool. In the preview release, APEX could be accessed using the URL http://(serveraddress)/ords. In order to better manage performance, Enterprise Reporting is now running on the same application server as ReportWorks. A port number has been added to the URL. APEX can now be accessed using the URL http://(serveraddress):8443/ords. If you are self-hosted, this port number may change based on how you have ReportWorks set up in your local environment.

How to Access Oracle Application Express (APEX)

1. Enter **http://(serveraddress):8443/ords** in your browser's **Address** field. The Oracle Application Express sign in page appears.
2. Use the following table to enter information in the fields:

Field	Description
Workspace	Enter **PS**.
Username	Enter your APEX username.
Password	Enter your APEX password.

3. Click **Sign In**.

   Note: The first time you sign in, you must reset this password.

4. Use the following table to enter information in the fields:

Field	Description
Current Password	Enter your current password.
New Password	Enter your new password.
Confirm Password	Enter your new password again.

5. Click **Apply Changes**. The Oracle Application Express home page appears.

Create Enterprise Reports in APEX

Use this procedure to create a new interactive report. For detailed information, see APEX documentation.

Note: There is no need to modify default settings unless otherwise indicated.

1. On the home page, click **Application Builder**.
2. Click **Application 100, PowerSchool Enterprise Reporting**.
3. Click **Create Page**. The Create a Page wizard appears.
4. Use the following table to enter information in the fields:

Field	Description
Application	Defaults to **100 - PowerSchool Enterprise Reporting**.
User Interface	Defaults to **Desktop**.
Select a page type	Click **Report**. The next page of the Create a Page wizard appears.

5. Click **Interactive Report**. The next page of the Create a Page wizard appears.
6. Use the following table to enter information in the Page and Region Attributes section:

Field	Description
Page Number	Defaults to a new (sequential) page number.
Page Name	Defaults to **Report1**. Enter a name for the page, if needed.
Page Mode	Defaults to **Normal**.
Region Template	Defaults to **Interactive Report**. **Note:** Do not change this setting.
Region Name	Defaults to **Report 1**. Enter a name for the region, if needed.

Breadcrumb	Defaults to **Do not use breadcrumbs on page**.

7. Click **Next**. The next page of the Create a Page wizard appears.
8. Use the following table to enter information in the Navigation Menu section:

Field	Description
Navigation Preference	Defaults to **Do not associate this page with a navigation menu entry**.

9. Click **Next**. The next page of the Create a Page wizard appears.
10. In the Report Source section, use the following table to enter information:

Field	Description
Source Type	Defaults to **Table**.
Table/View Owner	Verify **PS_APEX** appears as the default. It not, select it.
Table/View Name	Use the pop-up menu to choose the table/view from which you want to build the report.
Select Columns	Select one or more columns to be included in the report.
Link to Single Row View	Defaults to **Yes**.
Link to Single Row View	Defaults to **ROWID**.

11. Click **Next**.
12. On the next page of the Create a Page wizard, click **Confirm** once you have verified your information.

Field Level Security (FLS) Support in Enterprise Reporting

FLS is supported within Enterprise Reporting at the column level within interactive reports that are published to PowerSchool as Enterprise Reports. This means that in order to implement FLS in an Enterprise Report users must add the needed code to each column in an APEX interactive report. All of the example Enterprise Reports provided in the preview and current release have FLS implemented at the column level. Specifically, a PL/SQL Expression shown below needs to be added as a Condition for each column.

CAS_GET_FIELD_SECURITY('LASTFIRST','STUDENTS',:P101_CURRENT_USERID,:P101_CURRENT_SCHOOLID)

For more information on adding conditions at the column level to interactive reports in APEX, see the *Conditions Available in Application Builder* section in the *Application Express Application Builder User's Guide*.

Back Up Enterprise Reports

Interactive reports created or modified within APEX are not automatically backed up with your PowerSchool data. You should be sure to periodically back up all of your interactive reports. Any reports that you create or modify must be exported and then re-imported in order to restore them. For detailed information about how to export APEX reports, see the *Exporting an Application and Application Components* section in the *Application Express Application Builder User's Guide*. For detailed information about how to import exported APEX reports, see the *Importing Export Files* section in the *Application Express Application Builder User's Guide*.

SAML Single Sign-On User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool is able to be configured as a SAML Service Provider for Single Sign-On, which allows authorized users to sign in to a central identity provider and then seamlessly navigate to any of their PowerSchool systems with that single set of credentials.

Note: For information about creating a SAML Service Provider plugin in order to configure PowerSchool as a SAML Service Provider, see the *PowerSchool as a SAML Service Provider* section of the *PowerSchool Developer Site* available on PowerSource.

Setup

Before you can begin using PowerSchool as a SAML Service Provider for Single Sign-On, you must perform the following setup items:

- Enable SAML Service Provider Single Sign-On
- Enable SAML Service Provider Single Sign-On for Users

Enable SAML Service Provider Single Sign-On

Using the Plugin Management Dashboard page, you can enable a SAML Service Provider plugin. Enabling the plugin establishes PowerSchool as a SAML service provider (rather than an identity provider).

Note: In order to enable the SAML Service Provider Single Sign-On plugin, this PowerSchool-provided plugin must first be installed. If you have not yet installed the plugin, see *Install Plugins* for instructions on how to install it.

How to Enable SAML Service Provider Single Sign-On

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Select the **Enable/Disable** checkbox for the SAML Service Provider plugin. The Enable Plugin drawer appears.
5. Review the content.

   Note: If you have installed a plugin that is dependent on page customizations, you must enable page customizations on the Customizations page. For more information, see *Customizations*.

   Note: If PowerSchool encounters errors with the plugin, detailed information about the errors appears and you may not proceed with enabling the plugin.

6. Click **Enable** to proceed. A confirmation message appears.

How to Disable SAML Service Provider Single Sign-On

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Deselect the **Enable/Disable** checkbox for the SAML Service Provider plugin. The Disable Plugin pop-up appears.
5. Click **Yes**. A confirmation message appears.

Configure Providers Settings

Using the SAML Service Provider Setup page, you can configure the settings needed for establishing a successful SSO connection between an identity provider and PowerSchool as the service provider.

How to Configure External Identity Provider Settings

Use this section to set up the SSO connection from the identity provider to PowerSchool as the service provider.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the SAML Service Provider plugin. The SAML Service Provider Setup page appears.
5. Click **SAML Service Provider**. The SAML Service Provider Setup page appears.
6. Use the following table to edit information in the External Identity Provider Settings fields:

Field	Description
Name	The external identity provider's name. **Note:** This field is read-only.
Entity ID	The external identity provider's public URL.
Metadata URL	The service provider's metadata URL. The value is supplied by the service provider, which allows the IDP to communicate with the service provider application.

View IDP Metadata	The external identity provider's IDP Metadata must match what is stored in PowerSchool. This information can be used to diagnose communication issues. 1. Click to view. A separate window appears. 2. When done viewing, close the window.

7. Click **Save**. A confirmation message appears.

How to Configure Local Service Provider Settings

Use this section to configure PowerSchool as the service provider.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the SAML Service Provider plugin. The SAML Service Provider Setup page appears.
5. Click **SAML Service Provider**. The SAML Service Provider Setup page appears.
6. Use the following table to edit information in the Local Service Provider Settings fields:

Field	Description
Name	The local service provider's name.
Base URL	The local service provider's base URL. **Note:** This field is read-only.
Metadata URL	The local service provider's metadata URL. **Note:** This field is read-only.
Entity-ID	The local service provider's public URL. **Note:** This field is read-only.

7. Click **Save**. A confirmation message appears.

How to View PowerSchool User Identifying Elements for SSO

Use this section to view the SAML SSO attributes used for establishing successful SSO connection between the identity provider and PowerSchool as the service provider.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click the plugin with SAML Service Provider function. The SAML Service Provider Setup page appears.
5. Click **SAML Service Provider**. The SAML Service Provider Setup page appears.
6. Scroll to the PowerSchool User Identifying Elements for Single Sign-On section.
7. Click **Cancel** when done viewing.

Enable SAML Service Provider Single Sign-On for Users

Once the SAML Service Provider plugin is enabled, the SAML Authentication Setup page is made available. Using the SAML Authentication Setup page, you can enable SAML Single Sign-On, which allows authorized users to use PowerSchool, PowerTeacher and student access to the PowerSchool public portal as the central location from which to access their PowerSchool systems with a single set of credentials.

How to Enable SAML Service Provider Single Sign-On for Admin Users

Use this procedure to enable SAML Single Sign-On for PowerSchool.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **SAML Authentication Setup**. The SAML Authentication Setup page appears.
3. Select the **Enable SAML Authentication for Admin Users** checkbox to enable.

   Note: Alternatively, deselect the **Enable SAML Authentication for Admin Users** checkbox to disable.

4. Click **Submit**. The Security page appears.

How to Enable SAML Single Sign-On for Teacher Users

Use this procedure to enable SAML Single Sign-On for PowerTeacher.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **SAML Authentication Setup**. The SAML Authentication Setup page appear.
3. Select the **Enable SAML Authentication for Teacher Users** checkbox to enable.

   Note: Alternatively, deselect the **Enable SAML Authentication for Teacher Users** checkbox to disable.

4. Click **Submit**. The Security page appears.

How to Enable SAML Single Sign-On for Student Users

Use this procedure to enable SAML Single Sign-On for student access to the PowerSchool public portal.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **SAML Authentication Setup**. The SAML Authentication Setup page appears.
3. Select the **Enable SAML Authentication for Student Users** checkbox to enable.

   Note: Alternatively, deselect the **Enable SAML Authentication for Student Users** checkbox to disable.

4. Click Submit. The Security page appears.

Sign In to PowerSchool

Once the plugin with SAML Service Provider function and SAML Single Sign-On are enabled, authorized users can use PowerSchool, PowerTeacher and student access to the PowerSchool public portal as the central location from which to access their PowerSchool systems with a single set of credentials.

How to Sign In as an Admin User

Note: The **Enable SAML Authentication for Admin Users** checkbox on the SAML Authentication Setup page must be enabled.

Open your Web browser to your school's PowerSchool URL ([IP]/admin). Your school's Administrator Sign In page appears.

How to Sign In as a Teacher User

Note: The **Enable SAML Authentication for Teacher Users** checkbox on the SAML Authentication Setup page must be enabled.

Open your Web browser to your school's PowerTeacher URL ([IP]/admin). Your school's Teacher Sign In page appears.

How to Sign In as a Student User

Note: The **Enable SAML Authentication for Student Users** checkbox on the SAML Authentication Setup page must be enabled.

Open your Web browser to your school's PowerSchool public portal URL ([IP]/student). Your school's Student and Parent Sign In page appears.

Scheduling User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

System Administration

Copy Master Schedule

Using the Copy Master Schedule page, you can copy the master schedule (sections) from one year to another.

How to Copy the Master Schedule

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Scheduling, click **Copy Master Schedule**. The Copy Master Schedule page appears.
3. Use the following table to enter information in the fields:

Field	Description
School	The school in which you are currently working appears. If this is not the school into which you want to copy master schedule information, change the school by clicking the School link at the top of the page.
Source year	Choose from the pop-up menu the school year from which you want to copy.
Target year	Choose from the pop-up menu the school year to which you want to copy.
Clear existing scheduling terms in the destination school year	Select the checkbox to clear any existing terms in the destination school year and copy terms from the source school year. Deselect the checkbox to attempt to match the source and destination terms. If no matches are found, the source terms are added to the destination terms.
[Confirm]	Select the checkbox to confirm that you want to proceed.

	Note: Once the checkbox is selected, the **Submit** button appears enabled.

4. Click **Submit**. The Copy Master Schedule Warnings page displays if there are any conflicts or unavailable courses. If there are no conflicts or unavailable courses, skip to Step 5.

   Note: Only school calendar conflicts are copied as part of the master schedule; unavailable courses are not.

5. Click **Submit**. The Changes Recorded page appears.

Course Numbers

Using the Change Course Number function, you can change the number of an existing course in your course list to another number in your course list. The course list is the list of courses available to all schools on your PowerSchool system. When changing a course number, the system updates that number in courses, enrollments, sections, and historical data.

For example, assume two high schools on your server offer U.S. History. The course number for U.S. History at School A is 1000; at School B, it is 2000. Assume your district decides that the two schools should share the same course number. You need to change the course number for U.S. History at both schools to 1200.

First, you must create the new course, 1200. Then, change both course 1000 and 2000 to 1200, using the Change Course Number function.

Before changing a course number for a particular school, use the navigation bar at the top of the page to be sure you are working in the school in which you want to change the course number. If you are changing a course number for all schools on your system, it does not matter which school is currently selected.

Prerequisites

- Import the data from both schools.
- Create a new course with a unique course number for one school's courses.

How to Change a Course Number

Before changing a course number, retrieve the existing course number from the course list. For more information, see *How to View the Course List*.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Change Course Number**. The Change Course Number page appears.
3. Use the following table to enter information in the fields:

Field	Description
Current Course Number	Enter the existing course number.
Change to New Course Number	Enter the new course number.
This change affects only [school name] This change affects all schools on this server	Select an option to determine the scope of the course number change. **Note:** If you are changing course numbers because of duplicates, select the **This change affects only this school** option. The school name displayed is the school for which you created the new course number.

4. Click **Submit**.

Teacher Maximum Load

Use the Teacher Maximum Load function to prevent teachers from being scheduled to teach more students in a day than is allowed by their contracts. Activate the Teacher Maximum Load function at the district level and give each teacher who has a maximum load a value of the number of students they can teach in a day. To activate this function, see *How to Set Up Miscellaneous District Settings*. To specify a maximum load per teacher, see *Staff Scheduling Preferences*.

For sections to count towards a teacher's daily maximum load, you must modify the section to not be exempt from the maximum load calculation. Since you may not want some classes (such as supervised study hall) to count towards a teacher's maximum load, you can set sections as exempt from the maximum load calculation. To set a section's load status, see *Sections*.

When specifying a teacher's maximum load, the number must be a numeric integer representing the total number of students that a teacher can be scheduled for on any given day. Also, the aggregation of the number of students scheduled for a teacher is be based on seats scheduled; that is, if a student is scheduled into more than one of that teacher's classes, then the student is counted as many times as they are scheduled in that teacher's classes.

There are two ways to report on teacher maximum load information. One reports on the sections' maximum enrollment and the teachers' maximum student load for the term in which the specified date is included. However, since a section may have added or dropped enrollments, the report displays aggregated numbers for the maximum load. For more information, see *How to Run the Teacher Maximum Load Report*. The other recalculates the teacher maximum load and displays each enrollment violation for the current date. For more information, see *How to Calculate Teacher Maximum Load*.

How to Calculate Teacher Maximum Load

Use this function to display load violations and to refresh the maximum load information by recalculating teachers' maximum load information. Events that require recalculations include:

- When modifying the school calendar: changing a lettered day (such as making an A day a B day), marking a day as "in session," or switching bell schedules
- When modifying a section: changing the expression [such as from 1(A) to 1(B)], changing the maximum load status to or from Exempt, or changing the assigned teacher
- When changing a teacher's maximum load, specifically to a lower number

Note: Using USM to modify the course records (CC) table invalidates the daily count for the affected teacher, thereby circumventing the preventative controls of Teacher Maximum Load function. Also, running the special operation "Recover from mass transfer out" also invalidates the maximum load count. After performing either of these activities, perform the Teacher Maximum Load Setup function to recalculate and report violations of load counts.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Scheduling, click **Teacher Maximum Load Setup**. The Teacher Maximum Load Setup page appears.
3. Select a teacher or select **All Teachers** from the **Select a Teacher** pop-up menu.
4. Click **Submit**. The Maximum Load Table Setup Progress page appears. After calculating and updating the daily load counts for the selected teacher(s), the report

lists any load violations. If no violations exist, the message "No violations found" appears.

District and School Setup

Constraints

The School Setup menu includes a Scheduling link, Constraints. Click the Constraints link to access the Constraints page, which you can use to define scheduling constraints for students. Load constraints restrict the way the system loads students into courses that have already been scheduled.

This information is either captured as part of the PowerScheduler commit process or can be manually defined (added, edited, deleted) using these pages. In the past, this information was strictly defined within the context of mass scheduling within PowerScheduler.

Note: Since constraints restrict student schedules, the more constraints you define, the less flexibility the system has to load students into courses and the less optimal the resulting schedule will be. It is always best to use the fewest number of constraints required to accomplish your scheduling goals.

How to Add a Student/Student Avoid Constraint

Use a Student/Student Avoid constraint to specify that two selected students cannot be scheduled into any of the same course sections.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Student Avoid**. The Student/Student Avoid Constraints page appears.
4. Click **New**. The Edit Student/Student Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student 1	Click **Associate** to select the name of one of the students you want to separate from one another.
Student 2	Click **Associate** to select the name of the other student.

6. Click **Submit**. The Student/Student Avoid Constraints page appears.

How to Add a Student/Teacher Avoid Constraint

Use a Student/Teacher Avoid constraint to specify that this student and this teacher cannot be scheduled into any of the same course sections.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Teacher Avoid**. The Student/Teacher Avoid Constraints page appears.
4. Click **New**. The Edit Student/Teacher Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student	Click **Associate** to select the name of the student you want to avoid scheduling with a selected teacher.
Teacher	Click **Associate** to select the name of the teacher you want to avoid scheduling with the selected student.

6. Click **Submit**. The Student/Teacher Avoid Constraints page appears.

How to Add a Student Free Constraint

Use a Student Free constraint to specify those periods when a student must be free, such as when taking a course at another school.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Student Free**. The Student Free Constraints page appears.
4. Click **New**. The Edit Student Free Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description

Student	Click **Associate** to select the name of the student who needs to have a free periods
Schedule	Select the checkbox next to each period in each day that you want to schedule this student to have a free periods.
Term	Choose from the pop-up menu the term that this student needs the free periods.

6. Click **Submit**. The Student Free Constraints page appears.

How to Add a Section Link Constraint

Use a Section Link constraint to specify that if students are enrolled in one course section, they must also be enrolled in another, specific course section.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Section Link**. The Section Link Constraints page appears.
4. Click **New**. The Edit Section Link Constraint page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Course Number 1	Click **Associate** to select the name of one of the courses for which you want to link a section.
Section Number 1	Enter the section number of the course in the Course Number 1 field that you want to link to another course section.
Course Number 2	Click **Associate** to select the name of the other course for which you want to link a section.
Section Number 2	Enter the section number of the course in the Course Number 2 field that you want to link to the section in the Section Number 1 field.

6. Click **Submit**. The Section Link Constraints page appears.

How to Add a Student Preference Constraint

Use a Student Preference constraint to schedule a student into a particular course section. You can also specify the course per a specific term and teacher.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Student Pref**. The Student Preference Constraints page appears.
4. Click **New**. The Edit Student Preference Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student	Click **Associate** to select the name of the student you want to force to schedule in a specific course section.
Course Number	Click **Associate** to select the name of the course.
Section Number	Enter the section number of the course into which you want the student to be scheduled.
Term	Choose from the pop-up menu the term to which you want this constraint to apply (optional).
Teacher	Click **Associate** to select the name of the teacher who instructs this course section (optional).

6. Click **Submit**. The Student Preference Constraints page appears.

How to Modify Load Constraints

After creating load constraints, you can modify them by choosing Constraints under the Scheduling heading from the School Setup menu. Select the constraint you created to view the constraints by type.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click the name of the type of constraint you want to modify, such as Student Avoid.
4. Click the course name, student name, or teacher name in the row of the constraint you want to modify. The Edit page for that particular constraint appears.
5. Edit the information as needed:
    - Student Avoid
    - Teacher Avoid
    - Student Free
    - Section Link
    - Student Pref
6. Click **Submit**. The appropriate constraints page appears.

How to Delete Load Constraints

After creating load constraints, you can delete them by choosing Constraints under the Scheduling heading from the School Setup menu. Select the constraint you created to view the constraints by type.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click the name of the type of constraint you want to delete, such as Student Preference.
4. Click the course name, student name, or teacher name in the row of the constraint you want to delete. The Edit page for that particular constraint appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Course Grade Scales

Set up different grade scales and assign them to the appropriate courses. If you do not assign a grade scale to a course, the system assigns the default grade scale to that course. The default grade scale is determined when the system is set up.

For more information about setting up grade scales, see *Grade Scales*.

How to Assign Grade Scales to Courses

Courses are automatically assigned the default grade scale. Either use the default grade scale or assign a grade scale to a course. For more information, see *Grade Scales*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. A list of current courses appears in the courses menu.
3. Click the name of the course to which you want to assign a grade scale. The Edit Course District Information page appears.
4. Choose the grade scale from the **Grade Scale** pop-up menu.
5. Click **Submit**. The Changes Recorded page appears.

Graduation Sets

Use graduation sets to track student graduation progress. Graduation sets are sets of course requirements for which students must earn a specified number of credits. For example, you can create a graduation set for this year's incoming ninth graders.

Within a graduation set, create different subject area requirements, such as Science, Math, and English. Within each subject area requirement, define the number of credits students must earn to fulfill that requirement. For more information, see *Graduation Requirements*.

Monitor students' progress towards earning the credits they need to complete a predefined set of requirements for graduation from your school or entrance to a higher education institution. For more information, see *Graduation Progress*.

How to Add a Graduation Set

Create graduation sets to determine the number of credits in specific subject categories a student must earn to graduate. Define the graduation set and then define individual subject area requirements within the set by using course groups or individual course numbers.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click **New**. The Graduation Requirement Set page appears.
4. Enter the name of the graduation set.
5. Click **Submit**. The Graduation Sets page displays the new graduation set.

How to Edit a Graduation Set

Edit the name of a graduation set. To add, edit, or delete graduation requirements associated with the graduation set, see *Graduation Requirements*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click the name of the graduation set you want to edit. The Graduation Requirement Set page appears.
4. Edit the name of the graduation set.
5. To convert the graduation set into a graduation plan, click **Convert to Graduation Plan**. The Edit Graduation Plan page appears. Enter information as needed and then click Submit. For more information, see the *Graduation Planner User Guide* available on PowerSource.
6. Click **Submit**. The Graduation Sets page displays the edited graduation set.

How to Convert a Graduation Set into a Graduation Plan

Any existing graduation set may be converted to a graduation plan. For more information, see *Graduation Planner* or the *Graduation Planner User Guide* available on PowerSource.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click the name of the graduation set you want to edit. The Graduation Requirement Set page appears.
4. Click **Convert to Graduation Plan**. The Edit Graduation Plan page appears.
5. Edit the information as needed.
6. Click **Submit**. The Graduation Planner Setup page appears.

How to Delete a Graduation Set

Deleting a graduation set also deletes any associated graduation requirements.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click the name of the graduation set you want to delete. The Graduation Requirement Set page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Graduation Requirements

Use graduation sets to track student graduation progress. Graduation sets are sets of course requirements for which students must earn a specified number of credits. For more information, see *Graduation Sets*. Monitor students' progress towards earning the credits they need to complete a predefined set of requirements for graduation from your school or entrance to a higher education institution. For more information, see *Graduation Progress*.

Create different requirements within a graduation set. For example, create a requirement for each major subject area, such as Science, Math, and English. Within each subject area requirement, define the number of credits students must earn to fulfill that requirement.

How to Add a Graduation Requirement

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click **Edit Requirements** next to the graduation set to which you want to add a requirement. The Graduation Requirements: [Graduation Set] page appears.
4. Click **New**. The New Graduation Requirement: [Graduation Set] page appears.
5. Use the following table to enter information in the fields:

Field	Description
Subject Area	Enter the subject area of this graduation requirement, such as **English** or **History**.
Requirement Name	Enter the name of this requirement.
Prerequisite Hours	Enter the number of prerequisite course credit hours a student must earn to meet the graduation requirement.
Prerequisite Courses	Select one of the following options to identify the courses a student must complete to meet this requirement: • **These course numbers**: Enter the numbers of each course a student must complete. Separate course numbers with commas.

	Note: Most schools select this option and define specific course numbers. • **Courses with these credit types**: Identify a credit type and define the credit type for specific courses on the Course page. **Note:** Your school can create credit types to group courses together to fill a graduation requirement. Assign credit types to courses and specify that a requirement is filled by any courses or grades of that credit type. For example, if you create an ALGEBRA credit type in this field and assign it to several courses, and then you specify that any two courses with the ALGEBRA credit type fulfill a Math requirement; students will meet the Math requirement if they take two courses with the ALGEBRA credit type. • **Courses in this group**: Use the pop-up menu to choose a course group. Students must complete the credit hours identified for the courses within the group to meet this requirement. • **Any course at all**: Indicate that the student can complete the number of credit hours by completing any course. For example, select this option for an Electives graduation requirement.
Sort Order	Enter a number to determine the order in which the system evaluates the student's progress in this requirement in comparison to other requirements. PowerSchool evaluates graduation requirements from the smallest sort order number to the largest. For example, assume you assign a Band course to two requirements: Fine Arts and Electives. Assign Fine Arts a smaller sort order number than Electives so that the system first evaluates the student's progress in the Fine Arts requirement and then his or her progress in the Electives requirement. Because Band fulfills multiple graduation requirements, it may appear more than once on the student's Graduation Progress page. For more information, see *Graduation Progress*.

6. Click **Submit**. The Graduation Requirements: [Graduation Set] page displays the new requirement.
7. Repeat steps 4-6 for each requirement in this graduation set.

How to Edit a Graduation Requirement

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click **Edit Requirements** next to the graduation set for which you want to edit a requirement. The Graduation Requirements: [Graduation Set] page appears.
4. Click the name of the requirement you want to edit. The Edit Graduation Requirement: [Graduation Set] page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Graduation Requirement*.
6. Click **Submit**. The Graduation Requirements: [Graduation Set] page displays the edited requirement.

How to Delete a Graduation Requirement

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Graduation Sets**. The Graduation Sets page appears.
3. Click **Edit Requirements** next to the graduation set for which you want to delete a requirement. The Graduation Requirements: [Graduation Set] page appears.
4. Click the name of the requirement you want to delete. The Edit Graduation Requirement: [Graduation Set] page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Next School

Use the Next School Indicator to add, edit, or delete the names of schools identified as "next schools" which are schools that student graduates will attend when they leave your school. Next school selections are made either per student or as a default for all students. For more information about setting the default school, see *Next School Indicator*.

If the next schools share your PowerSchool system, PowerSchool automatically transfers student records to the next school when you use the end-of-year process.

How to Create a Next School Indicator

If there is more than one school that your students often graduate to or move to, you may want to set up additional next schools.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Next School**. The Next School page appears.
3. Click **New**. The Edit 'Next School' Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
School Name	Enter the name of the school.
School abbrev.	Enter the abbreviation for the school.
School number	Enter the school number.
Sort order for display	Choose the sort order on the list of next schools from the pop-up menu.

5. Click **Submit**. The Next School page displays the new school.

Now you and other users can assign it as the next school for any student.

How to Edit a Next School Indicator

There are times when it is necessary to edit a next school record on the PowerSchool system. The changes you make to the next school record apply to the school and not to the students who are assigned to attend that school.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Next School**. The Next School page appears.
3. Click the school name, school abbreviation, or school number to be changed. The Edit 'Next School' Record page appears.
4. Edit the information as needed. For field descriptions, see *How to Create a Next School Indicator*.
5. Click **Submit**. The Next School page displays the changes.

How to Delete a Next School Indicator

If students are no longer continuing on to a particular school that has been set up as a next school, delete that school from the list. Before doing so, it is important to verify that the school is to be removed. Any student assigned to that school is impacted by this change.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Next School**. The Next School page appears.
3. Click the school name, school abbreviation, or school number you want to delete. The Edit 'Next School' Record page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Periods

Use this page to view the list of periods already created for your school. Periods are set on the Years and Terms page. For more information, see *Years and Terms*. Here, you can edit period names and abbreviations.

Note: Each school on your PowerSchool system creates and maintains its own list of class periods.

Periods are used in combination with days to create schedule expressions. For example, a section of Biology that meets for the first period on each day of a two-day schedule has the expression 1(A-B). Periods are also part of what is defined as a section meeting. That section of Biology has two meetings, which are noted as 1(A) and 1(B). When running reports or viewing schedules, you can often filter by periods and/or days. Before displaying the results, however, your selections are validated against your school's bell schedule and calendar to determine if the period is valid for the selected date or date range.

How to View Periods

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Periods**. The Periods page displays the following:
    - **Period Number**
    - **Name**
    - **Abbreviation**
    - **Sort**

How to Sort Periods

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Periods**. The Periods page appears.
3. Note the **Sort** column indicates the order in which the periods will appear.
4. Drag and drop the period you want to move.
5. Repeat Step 4 for each period you want to move.
6. Click **Submit**.

How to Edit a Period

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Periods**. The Periods page appears.
3. Click the period Name or Abbreviation column. The Edit Period page appears.
4. Use the following table to edit information in the fields:

Type	Description
School Name	The name of the selected school appears.
School Year	The selected school year appears.
Period Number	The number of the selected period appears.
Period Abbreviation	Edit the abbreviation for the period, not to exceed three characters. The period abbreviation appears on various pages, such as the Edit Section page.
Period Name	Edit the name of the period. The period name can be descriptive.

5. Click **Submit**. The Periods page displays the edited period.

Preferences

The School Setup menu includes a Scheduling-related link, Preferences, used to access the Scheduling Preferences page, which you use to define scheduling preferences, teams, houses, buildings, and section types. The page is divided into five functional areas:

Preferences, Teams, Houses, Buildings, and Section Types. By default, the Preferences tab is selected.

This information is either captured as part of the PowerScheduler commit process or you can manually define it (add, edit, and delete) using these pages.

How to Define Scheduling Preferences

Use this page to define parameters that determine how long the system spends scheduling each course, section, and student.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Use the following table to enter information in the Automated Walk-In Scheduling section:

Field	Description
Use Buildings	Select the checkbox if this scenario uses buildings.
Use Houses	Select the checkbox if this scenario uses houses.
Close Sections at Max Enrollment	Select the checkbox to ensure that courses close at their maximum enrollment numbers.
Use Global Course Alternate Substitution	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use Student Request Alternate Substitution	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.

4. Use the following table to enter information in the Load Optimizations section:

Field	Description

Percent of schedule combinations to evaluate for each student	The default value of this field is 10. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. For example, if you enter 25, the system evaluates one-quarter of the possible schedule combinations for each student. If you enter 75, the system evaluates three-quarters of the possible schedule combinations for each student.
Minimum number of schedule combinations to evaluate before skipping	The default value of this field is 10,000. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. Entering a high number forces the system to sample a minimum number of student schedule course possibilities.

5. Use the following table to enter information in the Sorting section:

Field	**Description**
Class Day and Period Precedence	Choose an option from the pop-up menu to determine the sort order of the enrollments' expressions on the Modify Schedule - Enrollments student page. If sorted by **Day then Period**, enrollments are listed by day and sub-sorted by period, such as 1(A), 2(A), 3(A), 1(B), 2(B), then 3(B). If sorted by **Period then Day**, enrollments are listed by period and sub-sorted by day, such as 1(A), 1(B), 2(A), 2(B), 3(A), then 3(B).
Modify Schedule Enrollments	Choose an option from the pop-up menu to determine the sort order of the enrollments on the Modify Schedule - Enrollments student page. Select **Expression** to sort the student's enrollments by schedule expression, such as 1(A) then 2(A) or 1(A) then 1(B), depending on the sort order selected in the previous field. Select **CourseNumber-SectionNumber** to sort enrollments by course number and section number, such as ART100-2, PE101-1, then PE101-2.

6. Use the following table to enter information in the Student Alert section:

Field	Description
Incomplete Schedule	Select the checkbox to enable. If enabled, the alert "This student's schedule is incomplete." appears on the student pages for students who have an incomplete schedule. **Note:** To complete a student's schedule, navigate to the Modify schedule page via **Start Page > Select Student > Modify Schedule**. For more information, see *Course Requests and Schedule*.

7. Use the following table to enter information in the Engine Loader section:

Field	Description
Enable Server-Side Engine Loader	Select the checkbox to enable. If enabled, this feature removes the need to run the client scheduling engine on client machines, provides program balancing, and optimizes processing for faster and better results. **Note:** If enabled, define which programs you want to include in balancing. See *How to Define Program Balancing.*

8. Click **Submit**. The Changes Recorded page appears.

How to Add a Team

Some schools, most often middle or junior high schools, assign students and teachers to teams to provide the best support and monitoring system.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Teams** tab. The Teams page appears.
4. Click **New**. The Edit Team page appears.
5. Enter the name of the team (limited to 10 characters).
6. Click **Submit**. The Teams page appears.

How to Edit a Team

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Teams** tab. The Teams page appears.
4. Click the name of the team you want to edit. The Edit Team page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Team*.
6. Click **Submit**. The Teams page appears.

How to Delete a Team

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Teams** tab. The Teams page appears.
4. Click the name of the team you want to delete. The Edit Team page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a House

Some schools separate students into houses. For example, assume your school has House A (Grades 9 and 10) and House B (Grades 11 and 12). Determine which rooms, teachers, and students belong to each house. If the **Use houses** checkbox is selected on the Scheduling Preferences page, the system references which house a room is assigned to before scheduling courses in that room and gives scheduling priority to the appropriate house.

Also, sections are scheduled for houses based on the house assignment of the teachers scheduled for those sections. Students assigned to a house are assigned to a section either without a house or with the same house, whereas students not assigned a house can be assigned to any section.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Houses** tab. The Houses page appears.
4. Click **New**. The Edit House page appears.
5. Enter a name for the house (limited to 10 characters).
6. Click **Submit**. The Houses page appears.

How to Edit a House

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Houses** tab. The Houses page appears.
4. Click the name of the house you want to edit. The Edit House page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a House*.
6. Click **Submit**. The Houses page appears.

How to Delete a House

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Houses** tab. The Houses page appears.
4. Click the name of the house you want to delete. The Edit House page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Building

If your school campus contains several buildings, you can define each of them. Then, you can associate these buildings with students, teachers, and rooms. This way, the system knows to schedule courses in the appropriate building, taught by the appropriate teacher, and taken by the appropriate students.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Buildings** tab. The Buildings page appears.
4. Click **New**. The Edit Building page appears.
5. Enter a name for the building (limited to 10 characters).
6. Click **Submit**. The Buildings page appears.

How to Edit a Building

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Buildings** tab. The Buildings page appears.
4. Click the name of the building you want to edit. The Edit Building page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Building*.

6. Click **Submit**. The Buildings page appears.

How to Delete a Building

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Buildings** tab. The Buildings page appears.
4. Click the name of the building you want to delete. The Edit Building page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Section Type

Section types are special sections of a course. For example, your school might offer separate sections of courses for bilingual students. In this case, one section of the course is identified as bilingual. The teacher who instructs this section has a bilingual section type assignment. The students' requests also reflect the bilingual section type.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Section Types** tab. The Section Types page appears.
4. Click **New**. The Add/Edit Section Types page appears.
5. Enter a name for the section type (limited to 20 characters).
6. Enter a section type code (limited to two characters).
7. Click **Submit**. The Section Types page appears.

How to Edit a Section Type

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Section Types** tab. The Section Types page appears.
4. Click the name of the section type you want to edit. The Edit Section Type page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Section Type*.
6. Click **Submit**. The Section Types page appears.

How to Delete a Section Type

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Section Types** tab. The Section Types page appears.
4. Click the name of the section type you want to delete. The Edit Section Types page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

School Parameters

School parameters include the school's departments, facilities, and rooms, which are used for scheduling purposes. Use the following procedures to view, add, edit, or delete parameters. However, it is suggested that you define these parameters in PowerScheduler instead so that they appear system-wide. For more information, see *Departments*, *Facilities*, and *Rooms*.

Additionally, you can edit the names of cycle days, which, when combined with periods, create schedule expressions that indicate when a section is taught.

Days

How to Edit a Cycle Day Name

Use this procedure to modify a schedule day's abbreviation, which appears in places such as the master schedule.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Days**. The Cycle Days page appears.
3. Click the name or abbreviation of the day name you want to edit. The Edit Cycle Day page appears.
4. Use the following table to enter information in the fields:

Field	Description
Day Abbreviation	Enter the abbreviation for the day, not to exceed three characters.
Day Name	Enter the name of the day.

5. Click **Submit**. The Cycle Days page displays the edited day.

Departments

How to Add a Department

Create departments to sort information by department, such as on the master schedule.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Departments**. The Departments page appears.
3. Click **New**. The Add/Edit Department page appears.
4. Enter the department name.
5. Click **Submit**. The Departments page displays the new department.

How to Edit a Department

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Departments**. The Departments page appears.
3. Click the name of the department you want to edit. The Add/Edit Department page appears.
4. Edit the department name.
5. Click **Submit**. The Departments page displays the edited department.

How to Delete a Department

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Departments**. The Departments page appears.
3. Click the name of the department you want to delete. The Add/Edit Department page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Facilities

How to Add a Facility

Some courses require special equipment or facilities. For example, a chemistry course requires a lab, and a film course requires audio and video equipment. To associate courses that need special equipment, use facilities.

Note: You can assign multiple facilities to courses and rooms.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Facilities**. The Facilities page appears.
3. Click **New**. The Add/Edit Facility page appears.
4. Enter the facility name.
5. Click **Submit**. The Facilities page displays the new facility.

How to Edit a Facility

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Facilities**. The Facilities page appears.
3. Click the name of the facility you want to edit. The Add/Edit Facility page appears.
4. Edit the facility name.
5. Click **Submit**. The Facilities page displays the edited facility.

How to Delete a Facility

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Facilities**. The Facilities page appears.
3. Click the name of the facility you want to delete. The Add/Edit Facility page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Rooms

How to Add a Room

Define rooms to provide locations for courses to be taught. To determine if a room is scheduled during a particular time and day, sort the master schedule by room. For more information, see *Master Schedule*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Scheduling, click **Rooms**. The Rooms page appears.
3. Click **New**. The Add/Edit Room page appears.
4. Use the following table to enter information in the fields:

Field	Description
Room Number	Enter the room number.
Room Description	Enter a description of this room.
Department	Click **Associate** to select the department for this room. **Note:** Click **Department** on the School Setup page to create or edit departments at your school.
Building	Enter this room's building, if applicable.
House	Enter this room's house, if applicable.
Room Facilities	Click **Associate** to select this room's facilities, if applicable. Facilities are any special characteristics of a room that courses require. For example, a room might have a kitchen, computer lab, stage, or wood shop. Most classrooms do not have a facility. There is a limit of 50 characters that can be entered in this field. **Note:** Click **Facilities** on the School Setup page to create or edit facilities at your school.
Room Maximum	Enter a number to determine the maximum number of students that this room can accommodate. The capacity of the room limits the number of students that can enroll in a course.

5. Click **Submit**. The Rooms page displays the new room.

How to Edit a Room

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Scheduling, click **Rooms**. The Rooms page appears.
3. Click the name of the room you want to edit. The Add/Edit Room page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Room*.
5. Click **Submit**. The Rooms page displays the edited room.

How to Delete a Room

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Rooms**. The Rooms page appears.
3. Click the name of the room you want to delete. The Add/Edit Room page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Sections

A section is an occurrence of a course. Each course can have several sections that meet in different rooms at different times and are taught by different teachers. View, add, edit, and delete course sections from the School Setup page.

For example, a school has a chemistry course; however, because there are too many students for one class, there are several sections of chemistry. Two different teachers instruct it for four different periods each. Thus, the school has eight sections of chemistry. Each section has a different number, usually preceded by the same course number to indicate that it is part of the same chemistry course.

Each section has an associated schedule expression, which is the combination of periods and days in which this section is taught. For example, a section of Biology meets during fifth and sixth period on A and B days. The schedule expression 5-6(A-B) appears on the Edit Section page.

Navigate to and Work with Sections

You can access the Edit Section page from several areas within PowerSchool.

How to Access the Edit Section Page from School Setup

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Sections**. The Sections page appears.

Note: Only courses that are available for the selected school and year appear.

3. Choose the course name from the courses menu. The [course name] page appears.
4. Do one of the following:
    - To create a new section, click **New**.
    - To edit an existing section, click the section number in the Sec# columns.

    The Edit Section page appears.

How to Access the Edit Section Page from Teacher Schedules

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Choose the teacher name from the teacher menu. The Teacher Schedule [Teacher] page appears.
3. Do one of the following:
    - To create a new section, click **New**.
    - To edit an existing section, click the section number in the Sec# columns.

    The Edit Section page appears.

How to View Course Sections

Navigate to the [course name] page or the Teacher Schedule [Teacher] page. For more information, see *Navigate to and Work with Sections*. The course section page, you can do the following:

Field	Description
New	Click to add a new section. The Edit Section page appears. For more information, see *How to Add a Section*.
Exp	Click to view information about this section. The Edit Section page appears. For field descriptions, see *How to Add a Section*.
Sec #	Click to view information about this section. The Edit Section page appears. For field descriptions, see *How to Add a Section*.

Term	Click to view term information for this section. The Term page displays the **Term Name**, **Abbreviation**, and **Dates** for the term.
Teacher	Click to view the teacher's current schedule. The [Teacher's Name] page displays the **Exp**, **Term**, **Course #**, **Course**, **Size** and **Sec #**.
Room	The room in which this course section meets.
Enrollment	Click to display the section's class roster. The Class Roster page appears. For more information, see *How to View the Class Roster*.
Attendance	Click the chair icon to record meeting attendance for a specific date. This icon only appears if attendance can be entered for the date or term. For more information, see *Record Meeting Attendance by Section for a Specific Date*. Click the grid icon to record meeting attendance for a specific date range. This icon only appears if attendance can be entered for the date or term. For more information, see *Record Meeting Attendance by Section for a Date Range*.
Analytics	Click to view Analytics data. For more information, see *View Analytics Data*. **Note:** The Analytics icon only appears if Analytics is enabled. For more information, see *Enable Analytics.* **Note:** The data that appears on the graph is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.
Make all students listed above the current selection	Click to work with the group of students in all of the sections of the selected course. The Group Functions page appears. For more information, see *Work with Groups*.

How to Add a Section

1. Navigate to the [course name] page or the Teacher Schedule [Teacher] page. For more information, see *Navigate to and Work with Sections*.
2. Click **New**. The Edit Section page appears.
3. Use the following table to enter information in the fields:

Field	Description
Course Name	The name of the course you selected appears.
Course Number	To define a section for a different course number than the one you selected, enter that course number.
Schedule	Select the checkboxes for the combination of days and periods in which this section meets. For example, select the checkbox for **Period 1** and **Day A** if a section of Chemistry meets during first period on A days.
Term	The term selection defaults to the active term displayed in the PowerSchool header. Change the term from the pop-up menu if needed. The Start Date and End Date displays for the selected term.
Teacher Section Lead	Click **Add** to assign a Section Lead teacher. For more information, see *How to Assign a Section Lead*.
Teachers/Staff Additional	Click **Add** to assign additional teachers or staff to this section. For more information, see *How to Assign Additional Teachers or Staff to a Section*.
Gradebook Type	Select the gradebook type for this section. • Select **PTG** to use PowerTeacher Gradebook for this section. • Select **Gradebook Type** to use PowerTeacher Pro for this section. **Switching from PTG to PowerTeacher Pro**

<table>
<tr><td></td><td>Selecting PowerTeacher Pro will prompt teachers to migrate any existing PTG assignments for this section when they first launch PowerTeacher Pro.

The following items will NOT migrate from PTG:
Custom teacher-created versions of the grade scale.
Custom teacher-created score codes (if there is no corresponding grade scale item or special code item in the grade scale). For example, a teacher enters in score code of "x" = 80%. If there is no "x" in a grade scale or special code, then "x" cannot migrate to PowerTeacher Pro, but the value of 80% is migrated correctly.
Calculation settings. Since calculation settings do not migrate, be sure that you have created any new grade calculation formulas in PowerSchool, or instruct teacher to create grade calculation formulas in PowerTeacher Pro. For more information, see PowerTeacher Pro Settings.
Content links
Teacher-defined custom student fields
Classes that are designated as read-only.
For standards, PowerTeacher Pro uses grade scales instead of conversion scales. As part of the PowerSchool 10 upgrade, copies of conversion scales have been created as grade scales and attached to the appropriate standards. If the conversion scale is setup incorrectly, it will not create a grade scale, but will use what the district has set as the default grade scale. Be sure to review existing standards in PowerSchool and verify that the correct grade scales are associated to standards.</td></tr>
<tr><td>Room</td><td>Enter the room in which this course section meets.</td></tr>
<tr><td>Section Number</td><td>Enter the section number in this field. Do not enter special characters.

Note: Section numbers must be unique among sections of the same course for a given school year.</td></tr>
</table>

Grade Level	If this course is available only for a certain grade level, enter the grade level. Otherwise, leave this field blank.
Current Enrollment	The number of students currently enrolled in this course section appears.
Maximum Enrollment	Enter the maximum number of students who can enroll in this course section.
District Where Taught	If this course section is taught outside your district, enter the other district's ID in this field.
School Where Taught	If this course section is taught outside your school, enter the school's ID in this field.
Dependent Sections	If this course section has dependent sections, enter them in this field using the course.section, course.section format. If a student is enrolled in a class, it is not teacher-specific, but rather section-specific. Often used by elementary schools where students take a set of classes, dependent sections indicate that if a student is registered in one class, he or she must also register for the dependent class. If the dependent section conflicts with another class, you can manually drop the student from the class and add him or her to another section. This function has no implications with prerequisites or graduation requirements.
Program	Intended primarily for California Continuation Education alternative education program, the program you specify here identifies whether backfill should be applied when attendance is taken for the section. For more information, see *Backfill Management*.
Automated Walk-In Scheduling Program Restrictions	Choose one of the following options: • **Include** to only include students of specified special programs in being scheduled into specified sections.

<table>
<tr><td></td><td>Exclude to exclude students of specified special programs from being scheduled into specified sections.
If the Include option was selected, specify which special programs to include by doing one of the following:
Select the Select All Programs checkbox to select all programs.
Select the individual checkbox of each program.</td></tr>
<tr><td>Record Attendance Using Attendance Mode</td><td>Use the pop-up menu to indicate the method by which you want attendance recorded. At this time, Meeting attendance is your only option.</td></tr>
<tr><td>Record Attendance</td><td>If the section meets more than one period in a day, you can choose to take attendance once or for every period by selecting the Once for All Meetings option or the Each Meeting Separately option.</td></tr>
<tr><td>Exclude From Attendance</td><td>Select the checkbox if you do not want attendance and enrollment in this section to be counted towards any ADA/ADM calculations.</td></tr>
<tr><td>Exclude From Storing Final Grades</td><td>Use for sections that are not graded so blank records are not stored with final grades.
Do one of the following:
Select the Same as course option to use same value as the value selected for the course. See parenthesis.
Select the Include option to store grades for this section.
Select the Exclude option to skip this section when storing grades. This setting is useful in cases where storing grades may not be appropriate, such as study hall or lunch.
Note: The Exclude From Storing Final Grades course value is noted in parenthesis.</td></tr>
</table>

Grade Scale	Choose the grade scale from the pop-up menu. For more information, see *Grade Scales*. **Note:** The grade scale assigned to the course appears in parenthesis.
Exclude from GPA?	If different from the course settings, select the option to either include or exclude the grade from the GPA calculation. **Note:** The **Exclude from GPA** course value is noted in parenthesis.
Exclude from Class Rank?	If different from the course settings, select the option to either include or exclude the grade from the class rank calculation. **Note:** The **Exclude from Class Rank** course value is noted in parenthesis.
Exclude from Honor Roll?	If different from the course settings, select the option to either include or exclude the grade from the honor roll calculation. **Note:** The **Exclude from Honor Roll** course value is noted in parenthesis.
Section Type	Identifies the section as open only to be filled by students whose course requests are designated as the same section type. Choose the type of section, such as Bilingual, from the pop-up menu (optional). **Note:** For more information, see *How to Define Section Types*.
House	Identifies the section as open only to be filled by students who are designated as belonging to the same house. Whether this is enforced depends on the state of the scheduling preference Use Houses. Click **Associate** to select a house to which this section belongs. **Note:** For more information, see *How to Define Houses*.

Team	Identifies the section as open only to be filled by students who are designated as belonging to the same team. Choose the team associated with this section from the pop-up menu. **Note:** For more information, see *How to Define Teams*.
Close section at max	Identifies whether to enroll students into the section even if the maximum enrollment has been reached. If this is selected, no students will be enrolled if the current enrollment is equal to or greater than the maximum enrollment. Select the checkbox to not accept more enrollments than the maximum number of enrolled students.
Maximum Load Status	Use the pop-up menu to indicate whether the section should be exempt from counting towards a teacher's maximum student load: • **Exempt**: Students enrolled in this section do not count towards a teacher's maximum student load. • **Lab**: Same as non-exempt. • **Non-Exempt:** Students enrolled in this section count towards a teacher's maximum student load. **Note:** At this time, the Non-Exempt selection is not saved on this page. Use USM to set sections as non-exempt. In the Sections table, set the **Max_Load_Status** field to **Non-Exempt**. For more information, see *Teacher Maximum Load*. **Note:** For existing non-exempt sections and for all new sections, no values are stored for this field unless they are set to **Lab** or **Exempt** on this page, or they set to any of the three status types using USM. Sections with no values are ignored when calculating the teacher maximum load.
Allow PowerTeacher entry of Variable Awarded Credit	Use the pop-up menu to indicate whether or not to permit teachers to enter variable awarded credit, earned credit. If Yes is chosen, the Variable Awarded Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value.

	Note: This pop-up menu only appears when editing a section. To set variable awarded credit for multiple sections, see *Variable Credit Setup*.
Allow PowerTeacher entry of Variable Attempted Credit	Use the pop-up menu to indicate whether or not to allow teachers to enter variable attempted credit, potential credit. If Yes is chosen, the Variable Attempted Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. **Note:** This pop-up menu only appears when editing a section. To set variable attempted credit for multiple sections, see *Variable Credit Setup*.

4. Click **Submit**. The course information page displays the new section.

How to Edit a Section

1. Navigate to the [course name] page or the Teacher Schedule [Teacher] page. For more information, see *Navigate to and Work with Sections*.
2. Click the section number in the Sec# columns. The Edit Section page appears.
3. Edit the information as needed. For field descriptions, see *How to Add a Section*.
4. Click **Submit**. The course information page displays the edited section.

How to Delete a Course Section

When you delete a course section, all enrollment records associated with that section, both past and present, also are deleted. Therefore, you need to know the password to delete a course section.

Sections cannot be deleted if the current year contains one or more student sections (enrollments) with attendance records. If one or more students with attendance records are enrolled in a section being deleted, an error message appears, and you must reset the attendance for each student enrolled in the section. If a section is successfully deleted (no orphan attendance is found), PowerSchool generates a query to find any attendance associated with the section. If attendance records are found, they are deleted. To modify attendance, see *Meeting/Interval Attendance*.

1. Navigate to the [course name] page or the Teacher Schedule [Teacher] page. For more information, see *Navigate to and Work with Sections*.
2. Click the section number in the Sec# columns. The Edit Section page appears.

3. Click **Delete Section**. The Delete Section page appears.
4. Enter the required password in the **Password** field.

   Note: Your school's PowerSchool administrator can set this password.

5. Click **Confirm Delete**. The section is deleted.

Assign Teachers to a Section

Teachers are assigned to a section on the Edit Section page. The PowerSchool administrator can add multiple section lead and additional staff/teachers to a section. The teacher-of-record is the section lead teacher, and other staff/teachers are the additional teachers.

A lead teacher must be designated for every day the section’s term. Multiple lead teachers can be added for different days of the term, but no more than one teacher can be the lead teacher on any given day. This is done to keep a single teacher-of-record for every day the section meets, in order to remain compatible with systems that only allow for one teacher per section.

Note that “% Allocation” is only used for reporting purposes. It is not necessary to have allocation totals reach 100 percent, nor is it necessary to keep them below 100 percent.

For example:

Staff	Role	% Allocation	Start Date	End Date
Staff	Lead Teacher	100	9/1/12	12/1/12
Role	Lead Teacher	100	12/2/12	3/1/13
% Allocation	Co-Teacher	50	12/2/12	3/1/13

Working with Terms

Teacher start and end dates can never be set before or after the dates of a sections term. If the term changes to one that causes the dates to be out of range, (i.e. From Q1 to Q2), a notice will display stating that the dates had to be adjusted.

When changing a term, both the section lead and additional teacher association dates are mapped to the new term dates. Additionally, any gaps or overlaps are adjusted for Lead Teachers.

How to Assign a Section Lead Teacher

Assign a section lead Teacher on the Edit Section page. This procedure outlines how to access the Edit Section page from the Sections page. To access the Edit Sections page via the teacher's schedule, see *How to View Teacher Schedules from the Staff Page*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Sections**. The Sections page appears.
3. Choose the course name from the courses menu. The course information page appears.
4. Click the section number in the Sec# columns. The Edit Section page appears.
5. Click **Add** next to Teacher – Section Lead.
6. Use the following table to enter information in the fields:

Field	Description
Staff	Select the teacher from the pop-up menu.
Role	Displays Lead Teacher as the default, pre-defined role.
% Allocation	Displays the default percent allocation entered for this role. Enter a new value, if applicable.
Start Date	By default, displays the start date for the section. Enter a value or click the **Calendar** icon to select a date. **Note**: Start date cannot be set before or after the dates of a section term.
End Date	By default, displays the end date for the section. Enter a value or click the **Calendar** icon to select a date. **Note**: End date cannot be set before or after the dates of a section term.

Actions	Click the **Note** button to add note. The Notes dialog appears. Click **OK** to close the dialog. Click the **Delete** button to mark the row for deletion when you click Submit.

7. Click **Submit**. A confirmation message appears.

How to Assign Additional Teachers or Staff to a Section

Add teachers and/or staff to a section.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Sections**. The Sections page appears.
3. Choose the course name from the courses menu. The course information page appears.
4. Click the section number in the Sec# columns. The Edit Section page appears.
5. Click **Add** next to Teacher/Staff – Additional.
6. Use the following table to enter information in the fields:

Field	**Description**
Staff	Select the teacher from the pop-up menu.
Role	Select the role from the pop-up menu.
% Allocation	Displays the default percent allocation entered for this role. Enter a new value, if applicable.
Start Date	By default, displays the start date for the section. Enter a value or click the **Calendar** icon to select a date.
End Date	By default, displays the end date for the section. Enter a value or click the **Calendar** icon to select a date.

Actions	Click the **Note** button to add note. The Notes dialog appears. Click **OK** to close the dialog. Click the **Delete** button to mark the row for deletion when you click **Submit**.

7. Click **Submit**. A confirmation message appears.

Years and Terms

Define years and terms for your school. Years and terms affect many aspects of PowerSchool, such as the calendar setup, scheduling, enrollment, and final grades.

First, create the year term for your school. Then, define additional terms for the school year, if necessary.

Terms created on the Years & Terms page are "scheduling terms," which define the entire length of a school year (year term) as well as the length of sections offered during the school year (semester, quarter, etc.). Classes offered during the school year determine the required scheduling terms. If students have the same teacher, room, and section throughout the year, only the year term is needed. However, if students change teachers, rooms, or sections throughout the year, create additional terms of varying lengths (semester, quarter, etc.).

Note: Scheduling terms differ from "grading terms." For information about defining grading terms, see *Final Grade Setup*.

How to Add a School Year

Once you add the year term for a school, you cannot delete it.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **New**. The Create New School Year page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name of School Year	Enter the school year name.

Abbreviation	Enter the abbreviation of the school year. For the year term, use numbers. For example, enter **09-10** for the 2009-2010 school year.
First Day of School	Enter the start date of the school year using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Last Day of School	Enter the end date of the school year using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

5. Click **Submit**. The Years & Terms page displays the new school year.

How to Edit a School Year

Once you add a year term for a school, you can edit the elements of the term.

Note: When editing years and terms, be sure to follow the documented process outlined in Knowledgebase article 56872.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **Edit Terms.** The Term setup page appears.
4. Click the name of the year term. The Edit Term page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a School Year*.
6. Click **Submit**. The Years & Terms page displays the edited school year.

How to Define Terms

Define terms shorter than the year term in order to schedule sections of varying lengths (semester, quarter, etc.).

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.

3. Click **Edit Terms** next to the school year for which you want to define terms. The Term Setup page appears.
4. Click **New**. The Edit Term page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name of the Term	Enter the name of the term, which indicates when it occurs during the academic year. For example, enter **Semester 1**.
Abbreviation	Enter an abbreviation for the term. For the year term, use numbers. For example, enter **09-10** for the 2009-2010 school year. For additional terms, the first character of the abbreviation must be a letter. For example, enter **S1** for Semester 1.
First Day of Term	Enter the date of the first day of the term using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Last Day of Term	Enter the date of the last day of the term using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
What portion of the school year this term represents	Select the fraction or item that represents the portion of the school year during which the term takes place. For example, if you define Semester 1 and your school

	operates with trimesters, Semester 1 represents one-third of your school year.
Import File Term #	If you plan to import schedule or historical data from another system and the data is different from the abbreviation you define, enter the term code the other system uses to represent this term. For example, you might want to import data from a system that uses 1, 2, 3, and 4 to represent quarter terms Q1, Q2, Q3, and Q4. When you define **Q1**, enter **1** in the **Import File Term #** field. Then, when you import any data from the other system, PowerSchool saves information from term **1** as term **Q1**.

6. Click **Submit**. The Term Setup page displays the edited terms.
7. Repeat steps 4-6 for each term, including semesters, trimesters, or quarters.

How to Edit Terms

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **Edit Terms** next to the school year you want to edit. The Term Setup page appears.
4. Click the term you want to edit. The Edit Term page appears.
5. Edit the information as needed. For field descriptions, see *How to Define Terms*.
6. Click **Submit**. The Term Setup page displays the edited term.

Courses

The Courses page is the central point from which you can manage courses and course-related information at the district and school level.

Note: To manage sections of courses, see *Sections*.

View the Course List

Use the following procedure to view all courses for the district.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to View the Course List

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, use the following table to enter information in the Filter Results section:

   Note: If you apply a filter, those settings are retained and available each time you navigate back to this page.

   Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	Description
School(s)	To narrow list of courses by school, select the checkbox and choose the school by which you want to filter from the pop-up menu. **Note:** This field only appears at the district level.
[Status]	To narrow list of courses by course status, any combination of the following course statuses by which you want to filter: • **Active** - School(s) in which courses have been made available and is currently active. This is the default setting.

	• **Inactive** - School(s) in which courses have been made available but is currently inactive. • **Unavailable** - Course(s) that have not been made available. When in district mode, this filter is applied to the list of courses associated to the schools selected using the **School(s)** filter, or all schools if none are selected, and to the selected **Year** filter. When in school mode, this filter is applied to the list of courses associated only with the school selected in the **School** pop-up menu in the navigation toolbar, and to the selected **Year** filter.
Year	To narrow list of courses by school year, select the checkbox and choose the school year by which you want to filter from the pop-up menu.
Course Number	To narrow list of courses by course number, select the checkbox and enter the course number by which you want to filter.
Department	To narrow list of courses by department, select the checkbox and enter the department by which you want to filter.
Course Name	To narrow list of courses by course name, select the checkbox and enter the course name by which you want to filter.
Prerequisite Note	To narrow list of courses by prerequisite note, select the checkbox and enter the prerequisite note by which you want to filter.
Has Relationships	To narrow list of courses by courses that do or do not have course relationships, select the checkbox and choose **Yes** or **No** from the pop-up menu. **Note:** This field only appears at the school level.
Has Fees	To narrow list of courses by courses that do or do not have course fees, select the checkbox and choose **Yes** or **No** from the pop-up menu.

Has Sections	To narrow list of courses by courses that do or do not have course sections, select the checkbox and choose **Yes** or **No** from the pop-up menu. **Note:** This field only appears at the school level.

The list of courses displays based on the information you entered.

Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	**Description**
Manage Courses for This School	Click to access the Available Courses for [Year] page. For more information, see *How to Edit Course Status*. **Note:** This field only appears at the school level.
Print	Click to print the course list. For more information, see *How to Print the Course List*.
New Course	Click to create a new course. For more information, see *New Courses*. **Note:** This field only appears at the school level if enabled by this district.
[Course]	Do one of the following: • Select the checkbox in the header row to select all filtered courses. • Select the checkbox next to each course you want to work with.
Number	The number used to identify the course. Click to edit course information. For more information, see *How to Edit Course Information*.
Name	The name of the course. Click to edit course information. For more information, see *How to Edit Course Information*.

Department	The department the course is associated to. Click to edit course information. For more information, see *How to Edit Course Information*.
Prerequisite Note	Descriptive text regarding academic requirements or authorizations that must be fulfilled prior to an enrollment in a course. Click to edit prerequisites. For more information, see *Course Prerequisites*.
Fee	Indicates whether or not course enrollment fees are associated to the course. Click to edit course enrollment fees. For more information, see *Course Enrollment Fees*.
Relationship	When in school mode, indicates whether or not a relationship exists between this course and another course. For detailed more information, see *How to Edit Course Information*.
Sections	When in school mode, only courses, which are active for the school you are working in, appear. For more information, see *How to Edit Course Status*.
Active	When in district mode, schools in which this course has been made available. For more information, see *How to Edit Course Status*.
Inactive	When in district mode, schools in which this course has not been made available. For more information, see *How to Edit Course Status*.
Analytics	Click the **Analytics** icon to view Analytics data. **Note**: The Analytics icon only appears if Analytics is enabled. For more information, see *Enable Analytics.* **Note**: The data that appears on the graph is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

Edit Availability for Schools and Years	Click to edit which schools the selected courses will be made available to. For more information, see *Edit Availability for Schools and Years*. **Note:** This field only appears at the district level.
Edit Prerequisites	Click to add prerequisites for selected courses. For more information, see *How to Enter Prerequisites for Selected Courses*.

Edit Course Status

The Available Courses for [Year] page is comprised of two tabs. The **Available** tab displays a list all courses available for the selected school and year. Using this page, you can change a course's status from active to inactive or vice versa. Additionally, you can remove all the courses from the list that do not have sections taught in the current year. The **Unavailable** tab display a lists all courses that are unavailable for the selected school and year. Using this page, you can change a course's status from unavailable and inactive to available and active making the course available for the selected school and year.

Note: In addition to this procedure, you can make additional courses available for this school by *editing course availability information* or you can make additional courses available for multiple schools and years by *editing availability for schools and years*.

Note: This procedure may only be performed at the school level. When accessed at the school level, only courses that are available for the selected school and year appear.

How to Edit Course Status

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. The Courses page appears.
3. Click **Manage courses for this school**. The Available Courses for [Year] page appears.

   Note: By default, the **Available** tab appears selected.

4. Use the following table to enter information in the fields:

Field	Description

[Text]	The following informational text appears on the page: - This page lists all available courses for the selected school and year. - To make a course active for the selected school and year, select the checkbox and then click the Submit button. - Only available courses should be used in PowerScheduler and only available and active courses can be used in live scheduling. - Unavailable courses are not included in this list. - To make courses available or unavailable, use the Edit Availability for Schools and Years district level function or the Availability tab on the district level Edit Course page.
New	Click to create a new course. For more information, see *New Courses*.
Active	Do one of the following: - Select the checkbox next to the course you want to make active. - Deselect the checkbox next to the course you want to make inactive.
Course Name	The name of the course appears.
Course Number	The number of the course appears.
Department	The department of the course appears.
Credit Type	The credit type of the course appears.
Remove all courses from this school's course list that do not have any	Select the checkbox to remove all courses from this school's course list that do not have any sections taught this year (optional).

sections taught this year	

5. Click **Submit**. The Courses page appears.

How to Make Courses Available

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. The Courses page appears.
3. Click **Manage courses for this school**. The Available Courses for [Year] page appears.
4. Click the **Unavailable** tab. The Unavailable Courses for [Year] page appears.
5. Use the following table to enter information in the fields:

Field	Description
[Text]	The following informational text appears on the page: • This page lists all unavailable courses for the selected school and year. • Only available courses should be used in PowerScheduler and only available and active courses can be used in live scheduling. • To make courses available or unavailable, use the Edit Availability for Schools and Years district level function or the Availability tab on the district level Edit Course page.
Make Available and Active	Select the checkbox next to the course you want to make available and active. **Note:** This column only appears if your district allows schools to adjust course availability.
Course Name	The name of the course appears.
Course Number	The number of the course appears.

Department	The department of the course appears.
Credit Type	The credit type of the course appears.

6. Click **Submit**. The Available Courses for [Year] page appears.

   Note: The **Submit** button only appears if your district allows schools to adjust course availability.

Print Course List

Use the following procedure to print the course list in a printer-friendly format.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to Print the Course List

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Click **Print**. The Course Prerequisite Rule Notes pop-up window appears.
5. Click **Print**. The Print pop-up window appears.
6. Click **Print**. The Print pop-up window closes.
7. Close the Course Prerequisite Rule Notes pop-up window

Edit Course Information

Course information can be edited at the district level, as well as the school level. When at the district level, you can edit District, Fees, Prerequisites, and Availability information. When at the school level, can edit District - General, District - Standards, Fees, Prerequisites, Availability, Relationships, Scheduling, and Equivalencies information.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to Edit Course Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Use the following table to enter information in the fields:

Field	Description
View Course Information By Year	1. Click to access the View Course By Year page. By default, the current year is selected. 2. Choose a year from the **Select Year** pop-up menu to view course information for a different year. **Note:** For field descriptions, see *How to Edit Course District Information*.
District - General	Click to access the Edit Course District - General Information page. For more information see, *Edit Course District - General Information*.
District - Standards	Click to access the Edit Course District - Standards Information page. For more information see, *Edit Course District - Standards Information*.
Fees	Click to access the Edit Course Enrollment Fees page. For more information, see *Edit Course Enrollment Fees*.
Prerequisites	Click to access the Edit Course Prerequisites page. For more information, see *Edit Course Prerequisites (Individual Courses)*. **Note:** To edit prerequisites for multiple courses, see *Edit Course List Prerequisites (Selected Courses)*.
Availability	Click to access the Course Availability page. For more information, see *Edit Course Availability Information*.
Relationships	Click to access the Edit Course Relationships page. For more information, see *Edit Course Relationships Information*.

	Note: This procedure may only be performed at the school level.
Scheduling	Click to access the Edit Course Scheduling Information page. For more information, see *Edit Course Scheduling Information*. **Note:** This procedure may only be performed at the school level.
Equivalencies	Click to access the Course Equivalencies page. For more information, see *Edit Course Equivalencies*.

Edit Course District - General Information

Using the Edit Course District - General Information page, you can manage general information for the selected course.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to Edit Course District - General Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **District - General**. The [Course] - General page appears..
6. Use the following table to enter information in the fields:

Field	Description
Course Name	The name of the course appears.
Course Number	The number used to identify the course appears.
Course Name	Edit the name of the course.

Course Description	Enter a detailed course description that will appear on the student course request pages and in the printed version of the course catalog.
Alternate Course Number	If needed, enter an additional number used to identify the course.
Credit Hours	Enter the number of credits a student receives for taking the course.
Max Credit Hours	Enter the maximum number of credits a student receives for taking the course. The value must be greater than or equal to the **Credit Hours**. Once a value is entered, the value will be evaluated against the credit earned on stored grades to determine if it should be excluded from graduation progress/graduation planner based on the association to the grade policy related to the grade scale for the course or section. **Note:** For more information, see *Repeated Course Grade Suppression*.
CIP Code	If needed, enter the CIP code to identify courses as part of a state-managed vocational program.
Vocational Class	Select the checkbox if the course is a vocational class.
Program for All Sections	For the purpose of continuation education programs. Any program specified here will automatically be considered the program that every section of the course will belong to. Since this is stored for the district this will be true for all schools that use the course. If schools other than continuation education schools use the course then specify this as no selection (blank) and designate the proper program to each section of the course created within the continuation education schools. The programs available for selection can be defined in *Special Programs*.
Credit Type	Enter the credit type to indicate which credit type to display on the master schedule, such as **MATH** for mathematics courses, **ENG**

	for English courses, **FL** for foreign language courses, **VOC** for vocational courses, or **ELEC** for electives. This credit can then be applied to a graduation type, if applicable.
Default Maximum Enrollment	Edit the maximum number of students who can be enrolled in this course.
Department	Click **Associate** to select the department for this course. **Note:** Click **Department** to create or edit departments at your school.
Subject Area	Edit the subject area for the course.
Course Notes	If needed, enter descriptive text regarding the course or course enrollment.
Exclude from Attendance	Select the checkbox if you do not want attendance and enrollment in this section to be counted towards any ADA/ADM calculations. Otherwise, deselect the checkbox.
Exclude From Storing Final Grades	Select the checkbox to skip this course when storing grades. This setting is useful in cases where storing grades may not be appropriate, such as study hall or lunch.
Grade Scale	Choose the grade scale from the Grade Scale pop-up menu. For more information, see *How to Assign Grade Scales to Courses*.
GPA Added Value Points	Enter any added value for the grade points, such as 1 for one additional grade point. You can also use fractions of a point. Most schools do not enter added values.
Exclude from GPA?	Select the option to either include or exclude the grade from the GPA calculation.

Exclude from Class Rank?	Select the option to either include or exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Select the option to either include or exclude the grade from the honor roll calculation.
Use the Course for Lunch	Select the checkbox to indicate that this course will be used exclusively for scheduled lunches. Otherwise, deselect the checkbox. **Note:** For more information, see *Scheduled Lunch*.
Exclude on Report Cards/Transcripts	Select the checkbox to exclude all sections of this course from appearing on the schedule listing of Report Cards or the Transcript Object of Object reports. Otherwise, deselect the checkbox.
Update the Course in the District Course Archive for [Year]	Do one of the following: • Select the checkbox to update archived course information, as well as current course information. • Leave the checkbox blank to only update current course information. **Note:** This field only appears if the end-of-year process has been completed. For more information, see *End-of-Year Process*.

7. Click **Submit**. The Changes Recorded page appears.
8. Click **Back** to return to the Edit Course page displays the edited course.

Edit Course District - Standards Information

Using the Edit Course District - Standards Information page, you can manage standards information for the selected course.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to Edit Course District - Standards Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears
5. Click **District - Standards**. The [Course] - Standards page appears. All of the standards associated to this course for the current year appear.
6. Use the following table to enter information in the fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Basic Filter</td><td>
To filter the information that appears on this page, enter search criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section.
To filter by columns:

Click +.
From the first pop-up menu, choose one of the following:

Standard Identifier
Standard Name
Weight
Percent

Enter filter criteria in the field to the right of the pop-up menu.
Click Apply. The page refreshes and display filtered results.

Note: The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results.

To add another filter:

Click +.
Repeat Step 1 through Step 4.

Note: The + appears shaded if all filters have been added.

To delete a filter:
</td></tr>
</table>

	1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.
Standards	The standards name and identifier appears.
Weight	Enter the weight for this standard to be used to calculate into a traditional final grade when the traditional grade formula is set to be calculated by Specific Weight or Specific Sum. For more information, see Traditional Grade Calculation Formulas.
Percent	The percent value is auto-calculated based on the weight entered.
Calculate	Select the checkbox to set specific calculations methods for the lower-level standards. When selected, you must define a calculation method for the lower-level standards.
Calculation Method	Click Edit, and then enter the weight for each standard. The percent value automatically appears.

7. Click **Submit**. The Changes Recorded page appears.

Edit Course Enrollment Fees

Using the Edit Course Enrollment Fees page, you can manage course enrollment fees for the selected course. For more information, see *Course Enrollment Fees*.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

Edit Course Prerequisites (Individual Courses)

Using the Edit Course Prerequisites page, you can manage course prerequisites for the selected course. For more information, see *Enter Prerequisites for Individual Courses*.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

Edit Course Availability Information

Using the Course Availability page, you can manage school associations for the selected course by associating or disassociating a course with one or more schools. Once a course is associated with one or more schools, it is available and active on the Available Courses for [Year] page for the selected schools. From the Available Courses for [Year] page, the school administrator can fine-tune which courses are active or inactive.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to Edit Course Availability Information at the District Level

Use this procedure to adjust which schools a course is available at for a selected year.

Note: When accessed at the district level, only courses that are available for the selected year appear.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Availability**. The Course Availability page displays a summary of year and schools associations for the course.

   Note: If an ellipsis appears in the Schools column, there are additional schools associated to the year.

6. Click **Edit**. The School Availability for [Course] in the [School Year] pop-up appears.

   Note: If you have view only access to this page, the **Edit** button appears as a **View** button. If clicked, the School Availability for [Course and Year] pop-up displays a list of all schools where the course is available for that year. When done viewing, click the **x** in the upper-right corner of the pop-up.

7. Use the following table to enter information in the fields:

Field	Description

Unavailable	All schools where the course is not available for that year appear. To make a school available: 1. Click the school you want to make available. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing right. To make all schools available, click the double arrows pointing right.
Available	All schools where the course is available for that year appear. To make a school unavailable: 1. Click the school you want to make unavailable. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing left. To make all schools unavailable, click the double arrows pointing left. **Note:** Available schools that appear shaded are associated to sections and cannot be made unavailable.
Reset	Click to reset the Unavailable list and Available list back to their original state before you began moving schools from one list to another.

8. Click **Submit**. The Edit Course Availability page appears.

How to Edit Course Availability Information at the School Level

Use this procedure to adjust which years a course is available for a selected school.

Note: When accessed at the school level, only courses that are available for the selected school and year appear.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Availability**. The Course Availability page displays a summary of year and schools associations for the course.

   Note: If an ellipsis appears in the Schools column, there are additional schools associated to the year.

6. Click **View** to view the School Availability for [Course] in the [School Year] pop-up.
7. When done viewing, click the x in the upper-right corner of the pop-up.
8. Click **Edit Availability**. The [Course Number] Year Availability pop-up appears.

   Note: The **Edit Availability** button only appears if your district allows schools to adjust course availability.

9. Use the following table to enter information in the fields:

Field	Description
Unavailable	All years the course is not available. To make a course available for a selected year: 1. Click the year for which you want to make the course available. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing right.

	To make a course available for all years, click the double arrows pointing right.
Available	All years the course is available. To make a course unavailable for a selected year: 1. Click the year for which you want to make the course unavailable. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing right. To make a course unavailable for all years, click the double arrows pointing right. **Note:** Available years that appear shaded are associated to sections and cannot be made unavailable.
Reset	Click to reset the Unavailable list and Available list back to their original state before you began moving years from one list to another.

10. Click **Submit**. The Course Availability page appears.

Edit Course Relationships Information

Using the Edit Course Relationships page, you can manage the relationship between courses. The scheduling engine uses these course relationships when building a student's schedule. If you define a relationship for a course with another course, you do not have to define the relationship for both courses. But, you can define the relationship for both courses so that it is easy to identify this relationship regardless of which course you are viewing. The following three types of course relationships are used in PowerSchool:

- Prerequisite: Indicates relationship between two courses ensures that the student will be scheduled into the specified course so that the course is completed prior to the beginning of the second course.

- Corequisite: Indicates relationship between two courses ensures that the student will be scheduled into both courses so that the courses are taken concurrently.
- Postrequisite: Indicates relationship between two courses ensures that the student will be scheduled into the specified course after the student has completed the first course in the relationship.

This information is either captured as part of the PowerScheduler commit process or can be manually defined (added, edited, deleted) using this page.

Note: This procedure may only be performed at the school level.

How to Edit Course Relationships Information

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Relationships**. The Edit Course Relationships page appears.
6. Do one of the following:

Action	**Description**
Add	To add a new relationship: 1. Click **New**. The Edit Course Relationship page appears. 2. Click **Associate**. The Choices Dialog appears. 3. Select the number of the course for which you want to define a relationship. 4. Click **Submit**. The Choices Dialog closes. 5. Choose one of the following from the **Relationship Type** pop-up menu: • **Prerequisite** • **Corequisite** • **Postrequisite** 6. Click **Submit**. The Course Relationships page appears.
Edit	To edit an existing relationship:

	1. Click the name of the course you want to edit. The Edit Course Relationship page appears. 2. Edit as needed. 3. Click **Submit**. The Course Relationships page appears.
Delete	To delete an existing relationship: 1. Click the name of the course for which you want to delete a relationship. The Edit Course Relationship page appears. 2. Click **Delete**. 3. Click **Confirm Delete**. The Course Relationships page appears.

Edit Course Scheduling Information

Using the Edit Course Scheduling Information page, you can manage course-specific scheduling information used by the scheduling engine when building a student's schedule. This information is either captured as part of the PowerScheduler commit process or can be manually defined using this page.

Note: This procedure may only be performed at the school level.

How to Edit Course Scheduling Information

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Scheduling**. The Edit Course Scheduling Information page appears.
6. Use the following table to enter information in the fields:

Field	**Description**

Allow Student Repeat in Same Term	Select the checkbox to allow the system to schedule a student in more than one section of this course in the same term. For example, occasionally students need to double-up on a course within the same term. This is usually done for elective courses, such as Work Release.
Allow Student Repeat in Different Term	Select the checkbox to allow the system to schedule a student in more than one section of this course in different terms. Use this option for either academic or elective courses.
Load Priority	Enter a numerical value of 1 to 99 (1 being the highest priority) to prioritize in which course the system should schedule a student when a conflict between two of the student's requests arises. You can enter the same load priority number for several courses. For example, enter a load priority of 10 for all academic courses to ensure that students are loaded into these courses first, 20 for academic electives, and 30 for non-academic electives.
Load Type	Use the pop-up menu to choose whether this is an academic, elective, or alternate course. The system uses this classification to balance the types of courses in which the student is scheduled during a schedule term. For example, if your school's scheduling terms are semesters, the system does not schedule the student in all elective courses the first semester and all academic courses the second semester.
Use Pre-Established Teams	Select the checkbox if you want the system to reference teams when scheduling students into this course.
Use Section Types	Select the checkbox if you want the system to schedule courses according to section types.
Don't Allow Substitutions	Select the checkbox if you do not want the system to attempt to schedule a student in alternate courses if this course is full.

Global Substitution 1	Click **Associate** to select the first course substitution you want the system to schedule for every student who cannot be scheduled in this course.
Global Substitution 2	Click **Associate** to select the second course substitution you want the system to schedule for every student who cannot be scheduled in this course. The system will use this substitution if Global Substitution 1 is no longer available.
Global Substitution 3	Click **Associate** to select the third course substitution you want the system to schedule for every student who cannot be scheduled in this course. The system will use this substitution if Global Substitution 2 is no longer available.

7. Click **Submit**. The Edit Course Scheduling Information page refreshes.

Edit Course Equivalencies

Using the Course Equivalencies page, you can manage the relationship between a course and its equivalent. For example, if EHS101 (course) and EHS102 (course equivalent) are stored, then EHS102 courses can replace EHS101 grades. EHS102 is "equivalent to" EHS101. Once defined, course equivalencies are then used by the repeated course grade suppression process when calculating permanently store grades.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

How to View Course Equivalency

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Equivalencies**. The Course Equivalencies page displays the following information:
   - **Relationship**
   - **Equivalent Course Name**

- **Equivalent Course Number**
- **Start Date**
- **End Date**

How to Create a Course Equivalency

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Equivalencies**. The Course Equivalencies page appears.
6. Click **Add**. The Add Course Equivalency page appears.
7. Use the following table to enter information in the fields:

Field	Description
Relationship	Use the pop-up menu to indicate whether the equivalent course number **Can replace** or **Can be replaced by** the selected course.
Equivalent Course Number	Enter the course that is equivalent to the selected course. **Note:** As you begin entering the course name or number, PowerSchool automatically provides a drop-down list of suggestions that you may choose from.
Start Date	Do one of the following: • Enter the date the relationship begins or click the calendar icon to select a date. • Leave blank. **Note:** Data cannot overlap with an existing course equivalency.
End Date	Do one of the following: • Enter the date the relationship ends or click the calendar icon to select a date.

	• Leave blank. **Note:** Data cannot overlap with an existing course equivalency.

8. Click **Submit**. The Course Equivalencies page appears

How to Edit a Course Equivalency

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Equivalencies**. The Course Equivalencies page appears.
6. Click the **Pencil** icon of the course for which you want to edit a course equivalency. The Edit Course Equivalency page appears.
7. Edit as needed. For more information, see *How to Create a Course Equivalency*.
8. Click **Submit**.

How to Delete a Course Equivalency

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Choose the name of the course you want to edit. The Edit Course District Information page appears.
5. Click **Equivalencies**. The Course Equivalencies page appears.
6. Click the name of the course for which you want to delete a course equivalency. The Edit Course Equivalency page appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The Course Equivalencies page appears.

Edit Availability for Schools and Years

Using the Edit Availability for Schools and Years page, you can adjust course school associations by associating or disassociating courses with schools and years. Once courses are associated with schools and years, the courses are available and active on the Available

Courses for [Year] page for the affected schools and years. From the Available Courses for [Year] page, the school administrator can fine-tune which courses are active or inactive.

Note: This procedure may only be performed at the district level.

How to Edit Availability for Schools and Years

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Courses**. The Courses page appears.
3. To narrow the list of courses, see Step 3 of *How to View the Course List*.
4. Indicate the courses you want to work with by doing one of the following:
    - Select the checkbox in the header row to select all filtered courses.
    - Select the checkbox next to each course you want to work with.
5. Click **Edit Availability for Schools and Years**. The Edit Availability for Schools and Years page appears.
6. Use the following table to enter information in the Select Years section:

Field	Description
Years Source List	To add a year from the Years Source List to the Selected Years: 1. Click the year you want to add. **Note:** To select multiple years, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each year. 2. Click the single arrow pointing right. To add all years from the Years Source List to the Selected Years, click the double arrows pointing right.
Selected Years	To remove a year from the Selected Years to the Years Source List: 1. Click the year you want to remove. **Note:** To select multiple years, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each year.

	2. Click the single arrow pointing left. To remove all years from the Selected Years list to the Years Source List, click the double arrows pointing left.
Reset	Click to reset the Years Source List and Selected Years list back to their original state before you began moving schools from one list to another.

7. Click **Next**.
8. Use the following table to enter information in the Select Schools section:

Field	**Description**
School Source List	To add a school from the School Source List to the Selected Schools: 1. Click the school you want to add. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school. 2. Click the single arrow pointing right. To add all schools from the School Source List to the Selected Schools, click the double arrows pointing right.
Selected Schools	To remove a school from the Selected Schools to the School Source List: 1. Click the school you want to remove. **Note:** To select multiple schools, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each school.

	2. Click the single arrow pointing left. To remove all schools from the Selected Schools list to the School Source List, click the double arrows pointing left.
Reset	Click to reset the School Source List and Selected Schools list back to their original state before you began moving schools from one list to another.
Association Type	Do one of the following: • Select the **Make Available** option to make the courses available and active for the selected schools and years. • Select the **Make Unavailable** option to make the courses unavailable and inactive for the selected schools and years.

9. Click **Next**.
10. Use the following table to verify information in the Summary and Confirmation section:

    Note: Associations with conflicts will not be processed.

Field	Description
Courses Affected	Click to view the Courses Affected pop-up, which displays the courses you selected.
Years Affected	Click to view the Years Affected pop-up, which displays the years you selected.
Schools Affected	Click to view the Schools Affected pop-up, which displays the schools selected.
[Available/Unavailable] Associations that Already Exist	Click to view the [Available/Unavailable] Associations that Already Exist pop-up, which displays any associations that already exist for those associations you are trying to make.

Total Associations to be Added	Click to view the Total Associations to be Added pop-up, which displays the associations that will be added making the selected courses available for the selected schools and years.
Total Associations to be Removed	Click to view the Total Associations to be Removed pop-up, which displays the associations that will be removed making the selected courses unavailable for the selected schools and years.
Total Association Conflicts	Click to view the Total Association Conflicts pop-up, which displays the associations that were requested, but not allowed and the reasons why the request was not allowed.

11. Click **Submit**. A confirmation message appears.

Edit Course List Prerequisites (Selected Courses)

Using the Edit Course List Prerequisites page, you can manage course prerequisites for selected courses. For more information, see *Enter Prerequisites for Selected Courses*.

Note: This procedure may also be performed when signed in to a school by choosing **School**, and then clicking **Courses**. When accessed at the school level, only courses that are available for the selected school and year appear.

Edit Course Settings

Using the Course Settings page, you can control whether or not schools are allowed to create and edit certain course-related information.

Note: This procedure may only be performed at the district level.

How to Edit Course Settings

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **Course Settings**. The Course Settings page appears.
3. Use the following table to enter information in the fields:

Field	Description

Only allow new courses to be created at the District Office	Indicate whether or not schools can create new courses by doing one of the following:
	
	• Select the checkbox to only allow new courses to be created at the District Office. When selected, the following do not appear when signed in at the school level:
	    ◦ **New Course** button on the Courses page.
	    ◦ **Courses** the **Table** pop-up menu on the Quick Import page.
	    ◦ **Courses** in the **Import into this table** pop-up menu on the Import Template page.
	• Deselect the checkbox to allow schools to create new courses. When deselected, the following appear when signed in at the school level:
	    ◦ **New Course** button on the Courses page.
	    ◦ **Courses** the **Table** pop-up menu on the Quick Import page.
	    ◦ **Courses** in the **Import into this table** pop-up menu on the Import Template page.
	
	Note: By default, this checkbox is not selected.

Only allow course equivalencies to be created and edited at the District Office	Indicate whether or not schools can create and edit course equivalencies by doing one of the following: • Select the checkbox to only allow course equivalencies to be created and edited at the District Office. When selected, the Course Equivalencies page is view-only when signed in at the school level. • Deselect the checkbox to allow schools to create and edit course equivalencies.
Do not allow schools to adjust Course Availability	Indicate whether or not schools can adjust course availability by doing one of the following: • Select the checkbox to only allow course availability to be adjusted at the District Office. When selected, the following does not display when signed in at the school level:

	• The **Make Available** column on the Unavailable tab of the Available Courses for [Year] page. • The **Submit** button on the Unavailable tab of the Available Courses for [Year] page. • The **Edit Availability** button on the Course Availability page. • Deselect the checkbox to allow schools to adjust course availability.

4. Click **Submit**.

Edit Course Group

Using the Course Groups page, you can group like-courses together making it easier to manage similar courses.

Note: This procedure may only be performed at the school level.

How to Create a Course Group

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Course Groups**. The Course Groups page appears.
3. Click **New** in the courses menu. The Edit Course Group page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for the course group. **Note:** If there are multiple high schools on your server, you may want to create a system for naming your course groups so that they sort in a certain way. For example, you might call Apple Grove High School's course group containing ninth-grade core courses AGHS-9-Core Courses. If you followed this system, all of your high schools would sort together, as would the grade levels within them.
Type	Choose the type of course group from the pop-up menu:

	• **Scheduling Only**: Course group is used for scheduling purposes only. • **Graduation Set Only**: Course group is used for graduation requirement purposes only. • **Both**: Course group is used for both scheduling and for graduation requirement purposes.
Applies to	Choose whether you want to apply the course group to all schools or only to the current school. By default, course groups are only applied to the current school.

5. Select the checkbox next to the name of each course that should belong to this group.
6. Click **Submit**.

How to Edit a Course Group

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Course Groups**. The Course Groups page appears.
3. Choose the course group you want to edit from the courses menu. The Edit Course Group page appears.
4. Edit as needed. For more information, see *How to Create a Course Group*.
5. Click **Submit**.

How to Delete a Course Group

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Course Groups**. The Course Groups page appears.
3. Choose the course group you want to delete from the courses menu. The Edit Course Group page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Class Roster

The class roster is the central point from which you can view and manage the students enrolled in a specific class. Using the class roster, you can:

- View the class roster
- Mass drop students
- Mass drop and reschedule students
- Mass enroll students into this class
- Mass enroll students into a different class

Note: Dropping and enrolling may be performed for multiple students, as well as for a single student.

Navigate to and View the Class Roster Page

The Class Roster page is accessible from a number of areas within PowerSchool.

How to View the Class Roster From the Master Schedule Page

Note: The Master Schedule page must be set to View By Matrix in order to access the Class Roster page. For more information, see *How to Set Master Schedule Preferences*.

1. On the start page, choose **Master Schedule** under Functions in the main menu. The Master Schedule page appears.
2. Click the [Enrollment] link to display the section's class roster. The Class Roster page appears.

   Note: The [Enrollment] link appears to the right of the [Course.Section] link.

3. Note the [Teacher] and Course.Section displays.

How to View the Class Roster From the Sections Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Sections**. The Sections page appears.
3. Choose the course name from the courses menu. The course information page appears.
4. Click **Enrollment** to display the section's class roster. The Class Roster page appears.

5. Note the [Teacher] and Course.Section displays.

How to View the Class Roster From the Staff Page

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Current Schedule** from the staff pages menu. The selected teacher's schedule appears.
3. Click **Enrollment** to display the section's class roster. The Class Roster page appears.
4. Note the [Teacher] and Course.Section displays.

How to View the Class Roster From the Teacher Schedules Page

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. Click **Enrollment** to display the section's class roster. The Class Roster page appears.
4. Note the [Teacher] and Course.Section displays.

How to View the Class Roster

On the Class Roster page, you can do the following:

Field	Description
[Student]	By default, the Class Roster page displays only the names of the students in the class. Click a student's name to view student pages for that selected student.
Detailed View On	To view additional information for each student, click the **Detailed View** switch to **On**. The page refreshes and displays each student's: • **Name** • **Gender** • **Grade Level** • The date the student **Entered** the class • The date the student **Exited** the class

	• The enrollment **Status** for each student - Click to edit the student's enrollment record. For more information, see *How to Edit an Enrollment Record*.
Filter Results By	The filter function appears when the **Detailed View** switch is set to **On**. Use the filter function to narrow the list of students by one or more of the following: • **Active** - Select the checkbox to view active students. By default, this checkbox is selected. • **Dropped** - Select the checkbox to view dropped students. • **Pre-Registere**d - Select the checkbox to view pre-registered students. • **Gender** - Choose the gender from the pop-up menu to view **All**, **Female**, or **Male** students. • **Grade Level** - Choose the grade level from the pop-up menu. Click the arrow to collapse this section. Click the arrow again to expand this section.
Detailed View Off	Click the **Detailed View** switch to **Off** to only view students' names. **Note:** When viewing the Class Roster in "simple" mode, only students who are active appear. If a student's enrollment dates were modified, the student may no longer appear.

How to Edit an Enrollment Record

Use this procedure to view and edit students' enrollment record for this class.

1. On the Class Roster page, click the **Status** link next to the enrollment record that you want to edit. The Edit Enrollment Record pop-up appears.

   Note: The Edit Enrollment Record pop-up appears based on your security settings. For more information, see *Staff Security Settings*.

2. Use the following table to enter information in the fields:

   Note: For more information, see *All Enrollments*.

Field	Description
Student	The name of the selected student appears.
Course	The name of the selected course appears.
Teacher	The name of the selected teacher appears.
Expression	The name of the selected schedule expression appears.
Enroll Date	Enter the first day the student's enrollment is effective. An entry is only valid if: • The date entered is on or after the first day of the term, and; • Is less than the last day of the term. When entering date, us the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the first day the student's enrollment is no longer effective. An entry is only valid if: • The student has already been dropped from the class, and; • The date entered is after the first day of the term and not past the last day of the term. **Note:** If the student has not already been dropped from the class, you can use the **Drop Students** or **Drop Students and Reschedule** functions on the

	Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page. When entering date, use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
[Message]	A message appears indicating that the Edit Enrollment Record pop-up cannot be used to drop a student from the class. To drop a student from the class, use the **Drop Students** or **Drop Students and Reschedule** functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page.
[State-specific]	Enter state-specific information, as needed.

3. Click **Submit**. The Edit Enrollment Records pop-up closes and the Class Roster page refreshes.

   Note: The Class Roster page does not refresh if only the state-specific fields were edited. The Edit Enrollment Records pop-up closes and a confirmation message appears indicating your changes were saved.

   Note: When viewing the Class Roster in "simple" mode, only students who are active appear. If a student's enrollment dates were modified, the student may no longer appear.

Work with Checked Students

How to Make Current Student Selection

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. Click **Make Current Student Selection** to make the selected students your current student selection. The Group Function page appears. For more information, see *Work with Groups*.

How to Add to Current Student Selection

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. Click **Add to Current Student Selection** to add the selected students to your already existing current student selection. The Group Function page appears. For more information, see *Work with Groups*.

How to Mass Enroll Checked Students into a Different Class

Using the Enroll into Different Class function, you can quickly and easily enroll students from this class into a different class.

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. Click **Enroll into Different Class** to enroll the selected students into a different class. The Mass Enroll page appears.
3. To continue, see *How to Mass Enroll in a Class*.

How to Mass Drop Checked Students from this Class

Using the Drop from this Class function, you can quickly and easily drop students from this class. When dropping students from this class, you have the option to enroll them into a different class.

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. In the Use checked students to section, click **Drop from this Class** to drop the selected students from this class. The Drop Students Preview page appears.

Note: If you click **Back** to return to the Class Roster page, the students you selected remain checked, but do not become the current student selection. Only when the **Drop Students** or **Drop Students and Reschedule** button is clicked do the checked students become the current student selection.

3. Use the following table to verify information and make any necessary corrections prior to dropping students:

Field	Description
Exit Date	Defaults to today's date. Click **Edit Date** to select a different exit date, if needed.
Clear attendance on and after Exit Date	If dropping a student who has attendance records on or after the exit date, select the checkbox to clear the attendance records. Clearing attendance records avoids attendance records being orphaned. **Note:** If all students listed have attendance records on or after the exit date, the **Drop Students** and **Drop Students and Reschedule** buttons appear shaded. **Note:** To perform attendance auditing, you can access the DBlog table using DDA to view attendance records that have been cleared using this function. For more information DDA, see *Direct Database Access (DDA)* and for information about the DBlog table, see the *PowerSchool Data Dictionary Tables* available on PowerSource.
Number	The student's identification number.
Name	The student's name.
Action	Confirmation or warning: • Delete enrollment - The student’s drop date is on or before the enrollment date and has no attendance associated with the section. • Delete enrollment, delete attendance records (count of each record type) - The student’s drop date is on or before

	the enrollment date and has attendance associated with the section. • Drop on [date] - The student's enrollment can be dropped successfully. • Drop on [date], delete attendance records (count of each record type) - The student's enrollment can be dropped successfully. • None (not enrolled on [date]) - The student is not enrolled in the section. • None (student has attendance on or after [date]) - The student cannot be dropped because attendance records would be orphaned. **Note:** [Date] indicates the exit date if the exit date is within range of the term start/end dates. If it occurs after the term end date, then it is adjusted to equal the term end date. If it occurs before the term date begins, it is adjusted to equal the term begin date. **Note:** If all students listed cannot be dropped based on the action listed, the **Drop Students** and **Drop Students and Reschedule** buttons appear shaded.

4. Do one of the following:

   Note: All students in the current selection are evaluated to be dropped from the section. However, only students applicable to the section will be dropped.

   - To drop students from this class, click **Drop Students.** The Class Roster page displays a confirmation message. The dropped student(s) no longer appear.

     Note: If the exit date is in the future, the students remain on the Class Roster page until the scheduled exit date.

   - To drop students from this class and enroll them into a different class, click **Drop Students and Reschedule**. The students will be removed from the class effective the scheduled exit date and the Mass Enroll page appears. To continue, see *How to Mass Enroll in a Class*.

Work with Currently Selected Students

To work with currently selected students, you must first make your student selection prior to navigating to the Class Roster page.

Note: If you have not made a student selection prior to navigating to the Class Roster page, this section does not appear. For more information about making a student selection, see *Student Search*.

Note: To view student pages for the student selection, click the number in the Use currently selected [#] students to section header.

How to Mass Enroll Student Selection into this Class

Using the Enroll into this Class function, you can quickly and easily enroll students into this class.

1. On the Class Roster page, click **Enroll into this Class** to enroll the student selection into the section. The Mass Enroll Preview page appears.
2. To continue, see *How to Mass Enroll in a Class*.

How to Mass Drop Student Selection from this Class

Using the Drop from this Class function, you can quickly and easily drop students from this class. When dropping students from this class, you have the option to enroll them into a different class.

1. On the Class Roster page, in Use currently selected [#] students to, click **Drop from this Class** to drop the student selection from this class. The Drop Students Preview page appears.

   Note: All students in the current selection are evaluated to be dropped from the section. However, only students applicable to the section will be dropped.

2. Verify information and make any necessary corrections prior to dropping students. For field descriptions, see *How to Mass Drop Checked Students from this Class*.
3. Do one of the following:
   - To drop students from this class, click **Drop Students.** The Class Roster page displays a confirmation message. The dropped student(s) no longer appear.
   - To drop students from this class and enroll them into a different class, click **Drop Students and Reschedule**. The Mass Enroll page appears. To continue, see *How to Mass Enroll in a Class*.

Student Schedules

Work with Student Schedules

In PowerSchool, work with individual student schedules using the student pages menu or with a group of students using the Group Functions page. Add sections, drop sections, delete enrollment records, transfer students, or enroll an entire group of students. Use the scheduling engine to create student course request forms, a master schedule, and student schedules that are based on both of these elements. For more information, see *Master Schedule Overview*.

You can find the student schedule views on the student pages menu for any student. Each displays the student schedule from a different perspective. Some are view-only, while others can be modified.

- Bell Schedule View
- List View
- Manage Recommendations
- Matrix View
- Modify Current Requests
- Modify Future Requests
- Modify Schedule
- Modify Schedule - Requests
- Override Prerequisites
- Scheduling Setup
- View Current Requests
- View Future Requests

All Enrollments

This page displays the selected student's enrollment history. It is most often used by counselors reviewing the student's entry and exit dates to previous and current classes. Counselors and other school administrators can view assignments for the classes listed and any teacher comments. Data saved from PowerTeacher immediately a part of the student’s current record and is subject to change by the teacher. At the end of the term these grades are stored into an historical grades table at which point only certain school administrators, such as counselors, can edit these stored records. For more information, see *Work with Student Schedules*.

How to View Grades and Assignments

Use this option on the All Enrollment page to view grades and assignments for any class in which the student has been enrolled.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **All Enrollments** from the student pages menu. The All Enrollments page appears.

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. Not applicable for View and Edit columns.

3. Click **View** next to the class that you want to view. The Scores page displays the assignments that make up the class and the grades the student received on each assignment. You can also view this page by clicking on a score on the Quick Lookup page. For more information, see *How to View Student Assignment Scores*.

   Note: Assignments created in PowerTeacher Pro are noted on the Scores page.

   Note: This page is view-only for all users. To edit a record, see *How to Edit an Enrollment Record*.

How to Edit an Enrollment Record

View or edit course enrollment dates and teacher comments on the All Enrollments page.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **All Enrollments** from the student pages menu. The All Enrollments page appears.

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. Not applicable for View and Edit columns.

3. Click **Edit** next to the class that you want to edit. The Edit Enrollment Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Student	The name of the selected student appears.

Course	The name of the selected course appears.
Teacher	The name of the selected teacher appears.
Expression	The name of the selected schedule expression appears.
Enroll Date	Enter the first day the student's enrollment is effective. An entry is only valid if: • The date entered is on or after the first day of the term, and; • Is less than the last day of the term. When entering date, us the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the first day the student's enrollment is no longer effective. An entry is only valid if: • The student has already been dropped from the class, and; • The date entered is after the first day of the term and not past the last day of the term. **Note:** If the student has not already been dropped from the class, you can use the **Drop Students** or **Drop Students and Reschedule** functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page. When entering date, use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
[Message]	A message appears indicating that the Edit Enrollment Record pop-up cannot be used to drop a student from the class. To drop

	a student from the class, use the **Drop Students** or **Drop Students and Reschedule** functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page.
[State-specific]	Enter state-specific information, as needed.
Clean up overlapping enrollments	If the student has overlapping enrollments in a single section, this link appears. Click to access the Clean Up Overlapping Section Enrollments page.

5. Click **Submit**. The All Enrollment Records page appears.

View Course Requests

This page displays the courses a student has requested for the upcoming term within the current school year. Some of these requests may have been fulfilled while others may not have.

Note: This page is view-only for all users.

How to View Current Course Requests

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **View Current Requests**. The View Requests for [Scheduling Year] page appears.
4. Use the following table to review this page:

Field	**Description**
Crs Num	The number used to identify the course.
Course	The name of the course.
Type	Indicates whether course is required or elective.

Cr Hrs	The number of credit hours earned by taking this course.
Requirements	Indicates any course requirements.
Total Credit Hours Requested	The total number of credit hours earned by taking all requested courses.

How to View Future Course Requests

This page displays what courses a student has requested for the next scheduling year, which is defined in PowerScheduler.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **View Future Requests**. The View Requests for [Scheduling Year] page appears.
4. Review the page as needed. For field descriptions, see *How to View Current Course Requests*.

Modify Course Requests

At some schools, administrative staff or guidance counselors enter student course requests directly in PowerSchool for their students. Perhaps all of the ninth graders at your school have made their requests on paper. All initial student course requests and those entering student course requests on behalf of students should enter the student course requests in PowerSchool, not in the scheduling area. Use the scheduling area to change or delete student course requests after the initial requests are made in PowerSchool.

Note: If you use need to edit a request after it has been submitted, do so in the scheduling area. For more information, see *Student Course Requests*.

Because course requests can be made for the current year or for other scheduling years, you must set the schedule year for student requests made in PowerScheduler, in the PowerSchool Student and Parent portal, or on the Requests [Scheduling Year] page in PowerSchool. For more information, see *How to Set the Schedule Year*.

How to Modify Current Course Requests

This function lets students select the courses for the upcoming term within the current school year for which they want to register.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Modify Current Requests**. The Requests [Scheduling Year] page appears.
4. Use the following table to view search results:

Field	Description
Course Catalog	To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.
[Course Group]	Course requests are grouped by course group. If a course requests is not associated to a course group, it appears under Additional Requests. **Note:** If a course group appears read-only, it must be edited in PowerScheduler.
[Course]	Requested courses. If the following appear, click view more information: • A red **Exclamation** icon indicates an alert. • A **Note** icon appears if the course contains prerequisite notes. • A **Road** icon indicates a teacher has recommended the course.
[Edit]	Click the **Pencil** icon next to request a course or modify and existing request. If the following appear, click view more information: • A green **Checkmark** icon indicates if the request listed satisfies the requirements of the course group.

	• A red **Exclamation icon** indicates an alert.
Requires at least credit hours	Indicates the minimum number of credit hours in all course groups excluding Additional Requests.
Requesting credit hours	Indicates the sum of credit hours in all course groups excluding Additional Requests.
Requesting additional credit hours	Indicates the sum of credit hours of requested courses under Additional Requests.

5. Click **Submit**. The Changes Recorded page appears. View the results of these choices on the Requests View page. For more information, see *View Course Requests*.

How to Modify Future Course Requests

Students can select the courses for the next scheduling year for which they want to register.

Note: The scheduling year is defined in PowerScheduler. For more information, see *How to Set the Schedule Year*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Modify Future Requests**. The Requests [Scheduling Year] page appears.
4. Use the following table to view search results:

Field	Description
Course Catalog	To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

[Course Group]	Course requests are grouped by course group. If a course requests is not associated to a course group, it appears under Additional Requests. **Note:** If a course group appears read-only, it must be edited in PowerScheduler.
[Course]	Requested courses. If the following appear, click view more information: • A red **Exclamation** icon indicates an alert. • A **Note** icon appears if the course contains prerequisite notes. • A **Road** icon indicates a teacher has recommended the course.
[Edit]	Click the **Pencil** icon next to request a course or modify and existing request. If the following appear, click view more information: • A green **Checkmark** icon indicates if the request listed satisfies the requirements of the course group. • A red **Exclamation icon** indicates an alert.
Requires at least credit hours	Indicates the minimum number of credit hours in all course groups excluding Additional Requests.
Requesting credit hours	Indicates the sum of credit hours in all course groups excluding Additional Requests.
Requesting additional credit hours	Indicates the sum of credit hours of requested courses under Additional Requests.

5. Click **Submit**. The Changes Recorded page appears. View the results of these choices on the Requests View page. For more information, see *View Course Requests*.

How to Reference the Course Catalog

Using the Course Catalog pop-up, you can reference the course catalog for the selected scheduling year.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Do one of the following:
    - Click **Modify Current Requests**. The Requests [Scheduling Year] page appears.
    - Click **Modify Future Requests**. The Requests [Scheduling Year] page appears.
4. Click **Course Catalog**. The Course Catalog pop-up appears.
5. Enter search criteria in the **Search** field.
6. To filter by columns:

    a. Click **+**.
    b. From the first pop-up menu, choose one of the following:
        - **Course Name**
        - **Course Number**
        - **Description**
    c. Enter search criteria in the search field.

        Note: Use a comma-separated list for multiple values.

    d. Click **Apply**. The page refreshes and display filtered results.

7. To add another filter, click **+** and repeat steps a through d.

    Note: The **+** appears shaded if all filters have been added.

8. To delete a filter, click **-** next the filter.
9. Click **Apply**. The page refreshes and display filtered results.

    Note: To remove all filter selections, click **Clear**.

10. Use the following table to view search results:

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	Description
Course Name	The course name appears.
Course Number	The course number appears.
Description	The course description appears.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

11. Click **Close** when done.

Course Requests and Schedule

In PowerSchool, you create and maintain a primary class schedule for each student in your school. Throughout the year, you might need to make schedule changes for existing students or create new schedules for students who enroll at your school during the year. There are two ways to maintain student schedules: manual scheduling and auto-scheduling. Manual scheduling is section-specific and allows you to pick specific sections in which to enroll the student, overriding the system-defined schedule if one exists. Auto scheduling is course-specific. You enter a student's request for specific courses. The system then automatically schedules the student for the sections that best fits his or her schedule.

Note: Maintaining student schedules can be done in conjunction with Scheduler or independently.

How to Access the Modify Schedule - Enrollments Page

Use this page to modify the student's schedule. The page is divided into two functional areas: Enrollments and Requests. By default, the Enrollments tab is selected. The Modify Schedule - Enrollments page displays the student's section enrollments for the current year and school, as well as current course requests.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears. The following information is either captured as part of the PowerScheduler commit process or can be manually defined:

Field	**Description**
Enrollments	By default, the Enrollments tab is selected, which displays the student's section enrollments for the current year and school, as well as current course requests.
Requests	The second tab on the Modify Schedule page is Requests. The Modify Schedule - Requests page supports editing and entering course requests for the student. It is these requests that the scheduling engine uses to determine the students schedule. For detailed information, see *How to Access the Modify Schedule - Requests Page*.
View Entire Year Schedule	Click to view the student's schedule by each term within the selected term.
Edit Auto Schedule Parameters	Click to display the Automated Scheduling Setup page to modify default parameter settings for this scheduling session.
Functions	Click the arrow to expand this section. Click the arrow again to collapse this section. When creating a new section enrollment, enter the date that any enrollment becomes effective in the **Effective Enrollment Date** field. The field defaults to tomorrow's date, unless: • It is before the section's start date, in which case the start date defaults to the start date of the section, according to the term and schedule day on the school calendar. • It is after the section's start date but during an off-cycle day, in which case the start date defaults to the next valid schedule day for the section.

	Use **Search Available Classes** to enroll the student into a course: • **Course Number** - Use as a filter to search for available sections. • **Period** - Use as filter to search for available sections. • **Find** - Click to search for available classes. Use **Quick Enroll** to enroll the student into a section: • **Course.Section** - Use to search for a section and enroll the student immediately into the section. • **Enroll** - Click to initiate search/enroll.
Enrollments	The following information appears for each line item: • **Exp** - The period and day combination of the course. • **Trm** - The term in which the course is being taught. • **Crs-Sec** - The course and section number used to identify the course. • Click the **Section Teachers** icon next to the teacher’s name to view the teachers assigned to the class. The Section Teachers pop-up appears. When done viewing, click the **x** to close the Section Teachers pop-up. • **Course Name** - The name of the course. • **Note** - Prerequisites pertaining to the course, if any. For more information, see *Course Prerequisites*. • **Teacher** - The name of the teacher teaching the course. • **Room** - The room number in which the course is taught. • **Enroll** - The first day the student's enrollment is active. • **Leave** - The first day the student's enrollment is not active. **Note:** The **Section Teachers** icon appears only if there is more than one teacher assigned to the class. Use the following information to lock or drop the student's section enrollments: **Note:** If the Effective Enrollment Date is set to a date that is after the Leave date for an enrollment, then that enrollment is locked and cannot be adjusted. If the course is in the future or in progress, then you can lock/unlock as needed.

	• **Lock** - Click the **Lock** icon (appears unlocked) next to each section enrollment that should not be changed by the scheduling engine, if any. For instance, if you want the student to remain in Algebra for period 1 on MWF, select the **Lock** icon for that section enrollment. • **Unlock** - Click the **Lock** icon (appears locked) next to each section enrollment that should be changed by the scheduling engine, if any. • **Toggle Locks** - Click to lock or unlock all section enrollments. • **Drop** - Delete enrollments individually and immediately by selecting the checkbox next to the section enrollment you want to delete and clicking **Drop Selected**. The Drop Classes page appears. Verify the information you want to delete. Enter an exit date and click **Drop Classes**. The exit date is the first day the student's enrollment is not active. Use the format mm/dd/yyyy or mm-dd-yyyy. • **Drop All** - Click to immediately drop all the current section enrollments for the student. The Drop Classes page appears. Verify the information you want to delete. Enter an exit date and click **Drop Classes**. The exit date is the first day the student's enrollment is not active. Use the format mm/dd/yyyy or mm-dd-yyyy. • **Automated Schedule** - Use to initiate the automated scheduling process that uses the scheduling engine to produce the student's schedule. • **Manually Schedule Student** - Use to manually schedule the student into available courses by period.
Course Requests	Use to view the student's current course requests. For detailed information, see *How to Access the Modify Schedule - Requests Page*.

How to View Entire Year Schedule

Use the Entire Year Schedule link to view the student's schedule by each term within the selected term.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **View Entire Year Schedule**. The Entire Year Schedule page displays the student's schedule for the entire year by terms, such as quarter and semester.

How to Edit Auto Schedule Parameters

Use Edit Auto Schedule Parameters to modify default parameter settings for this scheduling session. The defaults for these values are defined via **Start Page > School Setup > Scheduling Preferences**. It is often useful to be able to override the default values just for the current scheduling attempt.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Edit Auto Schedule Parameters**. The Edit Auto Schedule Parameters page appears.
4. Use the following table to edit the information in the fields:

Field	Description
Use buildings	Select the checkbox if this scenario uses buildings.
Use houses	Select the checkbox if this scenario uses houses.
Close sections at maximum	Select the checkbox to ensure that courses close at their maximum enrollment numbers.
Use global course substitutes	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use student course substitutes	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.

Percent of schedule combinations to evaluate for each student	The default value of this field is 10. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. For example, if you enter 25, the system evaluates one-quarter of the possible schedule combinations for each student. If you enter 75, the system evaluates three-quarters of the possible schedule combinations for each student.
Minimum number of schedule combinations to evaluate before skipping	The default value of this field is 10,000. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. Entering a high number forces the system to sample a minimum number of student schedule course possibilities.

5. Click **Submit**. The Changes Recorded page appears.

How to Modify a Student's Schedule Using Automated Walk-In

With Automated Walk-In Scheduling, you no longer need to manually create schedules for students who have enrolled in school after the initial scheduling process has been completed. Instead, you can leverage the existing scheduling engine, which determines the most optimal schedule for the student automatically.

In a typical scenario for a school during the first week of a new school year, many students either do not have a schedule or need to revise their previously-created schedule. These students are sent to a counselor who often has many other students waiting to work on their schedule. It can be very frustrating for the counselor to have to manually find open sections in the master course schedule and try to create a schedule that works best for the student.

With Automated Walk-In Scheduling, PowerSchool automatically determines the most optimal schedule for the student while considering the many rules and constraints concerning the student and schedule, such as load constraints, course relationships, enrollment constraints, and section types. Additionally, you can select to schedule by team, house, or building. All this can be done while locking existing section enrollments to preserve those records yet schedule additional requests. Counselors then choose to accept or reject the schedule returned by the engine before it is made permanent.

The following functional flow describes the basic course of events to perform to successfully create a new schedule for an individual student or modify an existing schedule for an individual student within PowerSchool.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Enter the date the enrollment becomes effective. The default is set to today's date.

   Note: If any attendance records for the student exist before the new entry date or after the new exit date, an error message will appear. To modify attendance, see *Meeting/Interval Attendance*.

4. Before continuing, you can lock or drop student's section enrollments. For detailed information, see **Enrollments** in the *How to Access the Modify Schedule - Enrollments Page* field description table.
5. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

6. Click **New**. The Create Course Request [student name] page appears.
7. Click **Associate** to select the name of the course. The Associate Course page appears. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. When done selecting courses, click **Okay**.
8. Click **Submit**. The Modify Schedule - Requests page appears, which now reflects the new requests.
9. Modify the requests by identifying which ones are alternate requests and assigning priorities or associating one alternate course for the primary requests.
10. Click **Submit**. The Modify Schedule - Requests page refreshes.
11. Click **Enrollments**. The Modify Schedule - Enrollments page appears.
12. Click **Automated Schedule**. The information is exported to the scheduling engine. The scheduling engine creates the most optimal schedule for the student based on the students course requests, load constraints, course relationships and applicable scheduling parameters. The results are then imported from the scheduling engine.

    Once the engine determines a schedule for the student, the Automated Schedule Results page appears. The page displays any error messages, enrollments, and course requests. At this point, the results have not become the permanent schedule for the student. The results can only be accepted or rejected in whole.

    Note: You can always modify the schedule by dropping and adding enrollments via the Modify Schedule page.

13. Do one of the following:

- If the results are unacceptable, click **Discard** to clear the results. The Modify Schedule - Enrollments page displays the original schedule.
- If the results are acceptable, click **Accept**. The Modify Schedule - Enrollments page displays the new schedule.

How to Manually Modify a Student's Schedule

The schedule list view displays the student's schedule for the currently-selected term. Use this page to manually schedule students after viewing available courses by period.

Additionally, you can add or drop sections from a student's schedule using the Enroll and Drop pop-up menus. For more information about these topics, see *Add Sections* and *Drop Sections*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Manually Schedule Student**. The Manually Schedule Student page appears.
4. Use the following table to edit the information in the fields:

Field	**Description**
Enroll Date	Enter the date to indicate when the student enrolled in the selected courses. **Note:** If any attendance records for the student exist before the new entry date or after the new exit date, an error message will appear. To modify attendance, see *Meeting/Interval Attendance*.
Number	The course number appears.
Course Name	The course name appears.
Term	The term in which the course occurs appears.
Day	The day(s) on which the course occurs appears. Hover over the checkbox to display the following:

	• Course number and section ID [course.section]. • Number of seats enrolled and seats available [seats enrolled/seats available]. • List of all teachers associated to the section, sorted by role. **Note:** A day (or "cycle") is the number of repeating days that make up a schedule.
Period	Select the checkboxes next to the course, term, and expression in which you want to enroll the student. Deselect the checkboxes next to the course, term, and expression from which you want to drop the student. To view the Course Number, Teacher Name, and Enrollment Count, hover over the checkbox. **Note:** The student's currently scheduled classes appear in gray, available classes in green, and full classes in red. If an expression is gray and has a selected checkbox, the student is in the class. An asterisk (*) notation means that the class is full, regardless of color.
Enter a password for maximum enrollments override	If enrolling the student in a full class, enter the password to override the maximum enrollment in the field at the bottom of the page.

5. Do one of the following:
    - Click **Submit** to submit your changes. The Manually Schedule Student page appears.
    - Click **Continue**. The Modify Schedule - Enrollments page appears.
    - Click **Reset** to refresh the page to display the last saved selections.

How to Access the Modify Schedule - Requests Page

The Modify Schedule - Requests page supports editing and entering course requests for the student. Requests are what the engine uses to determine the student's schedule. The student will not be scheduled for any course that is not requested. The exception to this are locked enrollments, which will be kept even if a request does not exist for the course.

Although you can still enter requests through the Requests Modify Current and Requests Modify Future pages, this page offers more flexibility and functions. Existing requests entered by any other method appear on this page.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears. The following information is either captured as part of the PowerScheduler commit process or can be manually defined:

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

Field	Description
New	Click to create a new course request.
Number	The number of the requested course appears.
Course Name	The name of the requested course appears.
Alt	Select the checkbox to indicate that this is an alternate course request.
Code	Enter any single letter to relate alternate requests to a primary request. Alternate requests that are assigned this code are used to substitute for any primary requests that are assigned the same code.
Alt Priority	If you selected the Alternate checkbox, enter a priority number so the system will know which alternate to load first when a student does not receive the elective.

Section Type	Choose the course's section type, if applicable, from the pop-up menu. For example, a student may request a bilingual section of a course.
Alternate 1	Click **Associate** to select the name of the first alternate for this course.
Delete	To delete: • An existing course request, click **YES** under the Delete column next to the appropriate course request. • All existing course requests, click **ALL** at the bottom of the Delete column.

How to Create a New Course Request

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

4. Click **New** to create a new course request. The Edit Course Request [student name] page appears.
5. Click **Associate** to select the name of the course. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections.
6. Click **Submit**. The Modify Schedule - Requests page appears.
7. Enter information as needed.
8. Click **Submit**.

How to Edit a Course Request

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.

3. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

4. Edit the information as needed.
5. Click **Submit**.

How to Delete a Course Request

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

4. To delete:
   - An existing course request, click **YES** under the Delete column next to the appropriate course request.
   - All existing course requests, click **ALL** at the bottom of the Delete column.
5. Click **Submit**.

How to Reference the Course Catalog

Using the Course Catalog pop-up, you can reference the course catalog for the selected scheduling year.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.
4. Click **Course Catalog**. The Course Catalog pop-up appears.
5. Enter search criteria in the **Search** field.
6. To filter by columns:
   a. Click **+**.
   b. From the first pop-up menu, choose one of the following:
      - **Course Name**

        - **Course Number**
        - **Description**
    c. Enter search criteria in the search field.

       Note: Use a comma-separated list for multiple values.

    d. Click **Apply**. The page refreshes and display filtered results.
7. To add another filter, click **+** and repeat steps a through d.

   Note: The **+** appears shaded if all filters have been added.

8. To delete a filter, click **-** next the filter.
9. Click **Apply**. The page refreshes and display filtered results.

   Note: To remove all filter selections, click **Clear**.

10. Use the following table to view search results:

    Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	Description
Course Name	The course name appears.
Course Number	The course number appears.
Description	The course description appears.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

11. Click **Close** when done.

Scheduling Setup

Set student scheduling preferences before creating student course request pages or entering student course requests. By setting these parameters before students submit requests, requests will be created with the appropriate future school and schedule year identifiers. Set student scheduling preferences for an individual student or for a group of students in PowerSchool.

You can also set student scheduling preferences in PowerScheduler; for more information, see *How to Auto Fill Student Information*.

How to Set Scheduling Preferences for an Individual Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Scheduling Setup** from the student pages menu. The Edit Scheduling Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Next Year Grade	Enter the grade level that the student will be entering next school year. If the student is to be retained, enter the student's current grade level.
Priority	Enter a number for the Load Priority for this student. Typically, students in upper grade levels will be assigned a higher priority, such as **10**, to assure that they are scheduled first for courses that they require for graduation. Values range from 1 to 99 and are usually separated by increments of 10, such as 10, 20, 30, and so on.
Schedule This Student	Select the checkbox so that PowerScheduler will schedule the student.
Year of Graduation	Enter the year that the student is expected to graduate from the currently selected school.
Summer School Indicator	If a student plans on attending summer school, choose the appropriate summer school from the pop-up menu.

	Note: If a group of students plan on attending summer school, use the **Summer School Indicator** group function to identify which school the students will attend. For more information, see *Set Summer School Indicator for a Group of Students*.
Note for Summer School Admin	If the student is to attend summer school, you can enter a note for the summer school administrator, such as **Needs to retake Biology**. This note is viewed only on the Student Scheduling Setup page. **Note:** Because the End-of-Year process clears this field, summer school notes will not carry over from year to year.
Next School Indicator	Select the school that the student will enter next year. This ensures that the requests pages used by administrators, students, and parents display the correct course information and that the students are scheduled at the correct school. **Note:** If setting this preference for inactive students, those students appear in PowerScheduler along with the active students. Set this field to "blank" for transferred students.
Next Year Campus/Building (optional)	To select the campus or building that the student will go to next year, click **Associate**. Select a campus or building and click **Submit**.
Next Year House (optional)	To select the house that the student will belong to next year, click **Associate**. Select a house and click **Submit**.
Next Year Team (optional)	Choose the team that the student will belong to next year from the pop-up menu.

4. Click **Submit**. The Changes Recorded page appears.

How to Set Scheduling Preferences for a Group of Students

Enter information in the required fields to set scheduling preferences for a group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Next School Indicator**. The Next School Indicator page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the name of the school the selected students will attend during the next school year from the pop-up menu.
5. Click **Submit**. The Changes Recorded page appears.
6. Click the PowerSchool logo to return to the start page. The current student selection appears.
7. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
8. Under Functions, choose **Student Field Value**. The Student Field Value page appears.
9. Enter **Sched_NextYearGrade** in the **Field to Change** field.
10. Enter the appropriate next year grade level in the **New Field Value** field.
11. Deselect the **Clear Field Value** and **Do not overwrite existing data** checkboxes.
12. Click **Submit**. The Field Value page appears.
13. Click **Submit**. The Alert: Completed page appears.
14. Click the PowerSchool logo to return to the start page. The current student selection appears.
15. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
16. Under Functions, choose **Student Field Value**. The Student Field Value page appears.
17. Enter **Sched_Scheduled** in the **Field to Change** field.
18. Enter **True** in the **New Field Value** field.
19. Deselect the **Clear Field Value** and **Do not overwrite existing data** checkboxes.
20. Click **Submit**. The Field Value page appears.
21. Click **Submit**. The Alert: Completed page appears.

Student Schedule

There are three ways to display a student's schedule. The Bell Schedule View displays the student's schedule for the current week. The List View displays the student's schedule for the selected term in a list format. The Matrix View displays the student's schedule for the selected term in a graphical format.

How to View a Student's Bell Schedule

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Bell Schedule View** from the student pages menu. The Bell Schedule View page displays the student's schedule for the current week, using unique colors to distinguish each course.
3. Click the **Section Teachers** icon next to the teacher’s name to view the teachers assigned to the class. The Section Teachers pop-up appears.

   Note: This icon appears only if there is more than one teacher assigned to the class.

4. When done viewing, click the **x** to close the Section Teachers pop-up.

How to View a Student's Schedule (List View)

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **List View** from the student pages menu. The Schedule List View page displays the student's schedule for the currently selected term.

   The following information appears for each line item: schedule expression, term, course number, section number, course name, teacher, room number, enrollment date, and exit date.

3. To change terms, click the term link. The Change Term page appears. Use this page to select a different term in which to view the student's schedule.
4. To view the student's schedule by each term within the selected term, click **Entire Year Schedule**. The Entire Year Schedule page displays the student's schedule for the entire year by terms, such as quarter and semester.

How to Display a Student's Schedule (Matrix View)

The schedule matrix graphically represents a student's schedule for all days, periods, and terms in the selected year for the current school.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Matrix View** from the student pages menu. The Schedule Matrix View page appears.

The schedule matrix view displays the student's schedule for each period and day in each term. Identical colors on the schedule indicate the same course. A blank block means that nothing is scheduled for that block in that term. Each block can include the following information, depending on the matrix display preferences: course name, course number, section number, teacher name, room number, expression (the combination of periods and days), and year term.

For more information about the student schedule matrix preferences, see *Miscellaneous System Administration*.

Mass Enroll in a Class

Enroll an entire group of students in a class.

How to Mass Enroll in a Class

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Mass Enroll**. The Mass Enroll page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions** or by way of the Class Roster.

4. Use the following table to enter information in the fields:

Field	Description
Quick Enroll	If you know the course number and the specific section of the course you want to enroll the selected students in, you can use the Quick Enroll function. 1. Enter the course and section number in the **Course.Section** field. Separate the numbers with a period and no spaces.

	2. Click **Enroll**. The Enroll Students Preview page appears.
Filter By	If you do not know the course number and the specific section of the course you want to enroll the selected students in, you can use the Filter By function to help you find the section you are looking for. 1. Enter one or more search criteria: • **Period** - Choose the period from the pop-up menu. • **Term** - Choose the term from the pop-up menu. • **Teacher** - Choose the teacher from the pop-up menu. • **Day** - Choose the day from the pop-up menu. • **Grade** - Choose the grade level from the pop-up menu. • **Credit Type** - Choose the credit type from the pop-up menu, such as Math. • **Course** - Enter the course number. • **Show only classes with available seats** - Select the checkbox to display only classes that have not reached the maximum enrollment. 2. Click **Search.** Courses appear based on the selection criteria you entered. **Note:** Click column headings to sort in ascending order. Click again to sort in descending order. Not applicable for Note and Enrollment columns. 3. Click the course name you want to select. The Enroll Students Preview page appears.

5. On the Mass Enroll Preview page, use the following table to verify section and enrollment information and make any necessary corrections prior to enrolling students:

Field	Description

Entry Date	Defaults to today's date. Click **Edit Date** to select a different date, if needed.
Section Summary	Verify the following information: - Course Name - The name of the course. - Course Number - The course number used to identify the course. - Section - The section number used to identify the course. - Term - The term(s) in which the course is being taught. - Fees - Indicates whether or not a fee is associated to the course. - Pending Enrollment Count - The current enrollment in the section plus the number of students below that are about to be enrolled in the section. - Class Status - Indicates reason why student cannot be enrolled into the class: - Number of students selected exceeds section capacity - The number of students in the section plus the students in the selection exceed the maximum section capacity. This is only applicable if the section validates on maximum capacity. - Number of students selected exceeds teacher capacity - The number of students in the section plus the students in the selection exceed the maximum capacity for the main section's teacher. This is only applicable if the teacher validates on maximum capacity. - Section found - The course.section number you requested was a valid course.section for this school and year. - Section not found - The course.section number you requested was not a valid course.section for this school and year. - Selected section is not in the current term - Section must be in the current term to mass enroll into it. To override the maximum section capacity:

	1. Click **Override**. The Override Section Max pop-up appears. 2. Enter your password in the **Input Section Max Override Password** field. **Note:** This password is set using the **Password required to override a section's maximum enrollment** field on the district Miscellaneous page. 3. Click **OK**. The Override Section Max pop-up closes and the Mass Enroll Preview page refreshes.

Student Enrollment Summary	Verify the following information for each student:
	
	• Student Number - The number used to identify the student.
	• Student Name - The name of the student.
	• Action - Confirmation or warning:
	    • Already enrolled in [course.section] on [enrolldate] - Student is already enrolled in this section, therefore cannot be enrolled in it again. This does not prevent enrollment of other students and sections.
	    • Enroll in [course.section] on [enrolldate] - Confirmation message indicating student (s) will be enrolled in this section on this date.
	    • None - Error in validating one or more sections, such as the number of selected students exceeding the section's maximum capacity.

6. Use the following table to return to the previous page or to enroll students:

Field	**Description**
Back	Click to return to the previous page. Depending on how you accessed the Mass Enroll Preview page, either the Class Roster page or the Mass Enroll page appears.

	Note: If there are section errors that need to be corrected, only this button appears. **Note:** Your student selection is retained when returning to the previous page.
Enroll Students	Click to enroll the students into this class. The Class Roster page displays a confirmation message. **Note:** This button only appears if you access the Mass Enroll Preview page via the Class Roster page or the Mass Enroll page and if there is at least one student to be enrolled and there are no section errors.
Enroll Students and Reschedule	Click to enroll the students into this class. Once enrolled in this class, the Mass Enroll page displays a confirmation message. You can then enroll the students into additional classes using the Quick Enroll or Filter By function. **Note:** This button only appears if you access the Mass Enroll Preview page via the Class Roster page or the Mass Enroll page and if there is at least one student to be enrolled and there are no section errors.

Enroll Students in a Remote/Summer School Class

Sometimes students are eligible to take a course at another school but will not be transferring to that school for all courses. Students may be enrolled in courses at other schools as long as the other schools share your PowerSchool system.

Note: When storing grades for students taking classes at other schools, the TermID fields must match between the schools for those enrollments to store correctly.

How to Enroll Students in a Remote/Summer School Class

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Scheduling, choose **Mass Remote/Summer School Enrollment**. The Mass Remote/Summer School Enrollment page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Remote enroll currently selected students into a section:	Click to view the Student Selection page.
Show Summer Schools Only	Select the checkbox to narrow the **School Where the Class is Held** pop-up menu to only list summer schools. Otherwise, leave the checkbox blank.
School Where the Class is Held	Choose the school where the class is held from the pop-up menu.
Course	1. Begin entering the name of the course for which you want to enroll the student. A pop-up list of courses matching your entry appears. 2. Select the course for which you want to enroll the student.
Section	A list of sections and information about each section appears. Select the section number of the course for which you want to enroll the student. If the selection section is already at its maximum capacity, the Section is Full drawer appears. Enter the password to override the maximum enrollment and click **Submit**.
Grade	A list of grades for the selected summer school appear.

	Choose the grade for which you want to enroll the student from the pop-up menu. **Note:** Only appears for summer schools.
FTE	A list of FTEs for the selected summer school appear. Choose the FTE for which you want to enroll the student from the pop-up menu. **Note:** Only appears for summer schools.
Entry Code	A list of entry codes for the selected summer school appear. Choose the entry code for which you want to enroll the student from the pop-up menu. **Note:** Only appears for summer schools.
Enrollment Date	Enter the enrollment date. Defaults to the current date.

5. Click **Submit**. A confirmation message appears.

   Note: If students are already enrolled in the section or enrollment fails, a message to that effect appears.

6. To select the students, click **Make Current Selection**.

Add Section Enrollments

Manual scheduling is section-specific and allows you to add one or more specific sections in which to enroll the student, overriding the system-defined schedule if one exists.

Use the Search Available Courses or Quick Enroll functions on the Modify Schedule - Enrollments page to enroll students in a course section.

How to Add a Section Enrollment to a Student Schedule Using Quick Enroll

If you know the course number and the specific section of the course you want to enroll the student, you can use the Quick Enroll function to enroll the student immediately into the section.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Enter the course and section number in the **Course.Section** field.
4. Click **Enroll**. The Modify Schedule - Enrollments page refreshes and displays the new enrollment.

How to Add a Section to a Student Schedule Using Search Available Courses

To search for available courses per period, use the Search Available Course function. You can enter the number of the course in the Course Number field or leave it blank to search all courses. Then, choose the period from the Period pop-up menu to search for sections that are available at that time. Choose **All** to search for all available sections in all periods.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.

   Note: To narrow list of results, use the Filter By function. For detailed information, see *How to Filter Manual Schedule Options*.

3. Do one of the following:
   - Choose the period in which you want to enroll the student from the **Period** pop-up menu.
   - Choose **All** to search for all available sections in all periods.
4. Click **Find**. The Available Courses page appears displaying a list of courses taught during that period.

   Note: For information about the filter options, see *How to Filter Manual Schedule Options*.

   The page displays the following information:

Field	Description
Crs.Sec	The course and section number used to identify the course.
Course Name	The name of the course.

Note	Prerequisites pertaining to the course, if any. For more information, see *Course Prerequisites*.
Expression	The period and day combination of the course.
Term	The term in which the course is being taught.
Teacher	The name of the teacher teaching the course.
Grade	The grade level for which the course is being taught.
Credit Type	The credit type, such as **Math**.
Cr Hours	The number of credit hours earned by taking this course.
Enrollment	The number of students currently enrolled in this course during the selected period, followed by the maximum enrollment figure.

5. Enter the first day the student's enrollment is effective in the **Enroll date** field using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
6. Click a course name to add that course to the student's schedule during the selected period. The Modify Schedule - Enrollments page appears.

   If your system is configured to notify you that the section enrollment is at or above capacity, the Section is Full page appears if the section is at or above capacity. You must enter a password to override the capacity.

How to Filter Manual Schedule Options

Filter the courses that appear on the Available Courses page when manually scheduling students. Filtering focuses your search for an available class according to a number of criteria, such as teacher, credits, and current class size.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Do one of the following:
    - Choose the period in which you want to enroll the student from the **Period** pop-up menu.
    - Choose **All** to search for all available sections in all periods.
4. Click **Find**. The Available Courses page appears displaying a list of courses taught during that period.
5. Select one of the following to filter information on the Available Courses page.

Field	Description
Period	Choose the period from the pop-up menu.
Term	Choose the term from the pop-up menu.
Teacher	Choose the teacher from the pop-up menu.
Day	Choose the day from the pop-up menu.
Grade	Choose the grade level from the pop-up menu.
Credit Type	Choose the credit type from the pop-up menu, such as **Math**.
Course	To jump to a particular course, enter the course number and press RETURN (Mac) or ENTER (Windows).
Show only classes with available seats	Select the checkbox to display only classes that have not reached the maximum enrollment.

6. Repeat Step 4 to further filter the selections.

Drop Section Enrollments

Manual scheduling is section-specific and allows you to drop one or more section enrollments from a student's schedule, overriding the system-defined schedule if one exists. Because dropping a section enrollment from a student's schedule has serious ramifications, use caution when performing this procedure.

How to Drop a Section Enrollment From a Student Schedule

Drop section enrollments individually and immediately by selecting the appropriate Drop checkbox next to the section enrollment you want to delete. To efficiently drop more than one section enrollment from a student's schedule, see *How to Drop Section Enrollments From a Student Schedule*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Select the checkbox next to the section enrollment you want to delete.
4. Click **Drop**. The Drop Classes page appears.
5. Verify the information you want to delete.
6. Use the following table to enter information in the fields:

Field	Description
Student	The selected student appears.
Period	The selected period appears.
Term	The selected term appears.
Crs-Sec	The selected course and section abbreviations appear.
Course	The selected course title appears.
Exit Date	Enter the exit date, which is the first day the student's enrollment is not active or the day after the student's last day in class. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

7. Click **Drop Classes** to drop the section enrollment. PowerSchool drops the student from the selected section, and the schedule appears without the deleted section enrollment.

   Note: If any attendance has been recorded for the enrollment past the dates entered in the Exit Date field, an error message appears. Because you cannot drop enrollments with attendance records past the exit date for the enrollment, you must correct the attendance records before dropping the enrollment.

How to Drop All Sections From a Student Schedule

Use this procedure to drop all section enrollments from a student's schedule.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **All** in the Drop column. The Drop Classes page appears.
4. Enter in the Exit Date field the first day the student is not in class using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
5. Click **Drop Classes** to drop the section enrollment. PowerSchool drops the student from all sections, and the schedule appears without the deleted section enrollments.

   Note: If any attendance has been recorded for the enrollment past the dates entered in the Exit Date field, an error message appears. Because you cannot drop enrollments with attendance records past the exit date for the enrollment, you must correct the attendance records before dropping the enrollment.

Schoolnet User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool includes a close integration with Schoolnet, which allows authorized PowerSchool users to seamlessly transition from PowerSchool into Schoolnet.

Schoolnet provides a centralized solution for aligning student assessments, curriculum, and instruction where administrators, teachers, and parents are able to view summarized information for schools, classes and students, as well as detailed reporting and analysis. Using these tools can help administrators, teachers, and parents improve school performance and increase student achievement.

When accessing Schoolnet, My Schoolnet is the main landing page, or portal, for logged-in Schoolnet users. It is designed to provide quick, one-click access to Schoolnet components.

Setup

Before you can begin using Schoolnet, you must perform the following setup items:

- Configure PowerSchool Installation Settings
- Configure Schoolnet Version Management Settings (optional)
- Configure Single Sign-On Settings
- Configure SAML Inline Authentication
- Configure PowerSchool Event Subscriptions
- View Identity Attributes (optional)
- View OAuth Client Credentials (optional)
- Enable Schoolnet Single Sign-On
- Configure Schoolnet Roles (optional)
- Assign Schoolnet Roles to Staff
- Enable Schoolnet for Students and Parents (optional)

Configure PowerSchool Installation Settings

In order for Schoolnet to function, the **PowerSchool Identity Provider** checkbox and the **PowerTeacher API** checkbox must be selected for all nodes during the PowerSchool installation process. For more information, see the *PowerSchool Installation Guide* available on PowerSource.

Configure Schoolnet Version Management Settings

When upgrading to a new version of PowerSchool, be sure to select the version of Schoolnet you want to use. Depending on the Schoolnet version you have installed, only Schoolnet integrated features associated with that version display.

How to Configure Schoolnet Version Management Settings

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

   Note: If District does not appear in the main menu, click **School** in the navigation toolbar, and choose **District Office**.

2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Click **Schoolnet Settings**. The Schoolnet Settings page appears.
4. Click **Schoolnet Version Management Settings**. The Schoolnet Version Management Settings page appears.

5. Use the following table to enter information in the fields:

Field	Description
Check Schoolnet version used by your system	Click **Check** to display the Schoolnet version used by your system.
Select the version of Schoolnet you are using	Use the pop-up menu to choose the version of Schoolnet you are using.
Automatically update Schoolnet version during nightly tasks and at PowerSchool startup?	Select the checkbox to automatically update Schoolnet version during nightly tasks and at PowerSchool startup. Otherwise, deselect the checkbox. By default, the checkbox is selected. **Note:** By default the checkbox is selected.

6. Click **Submit**. A confirmation message appears.

Configure Single Sign-On Settings

Using the Single Sign-On Setup for Schoolnet page, you can configure the settings needed for establishing a successful SSO connection between PowerSchool and Schoolnet making the transition between PowerSchool and Schoolnet seamless.

When configuring these settings, all links must follow these standards:

- Only HTTP over SSL (HTTPS) is allowed.
- Only SAML HTTP Redirect Profile is supported.
- Certificate of the PowerSchool Identity Provider (IDP) is required.
- PowerSchool is the only Identity Provider (IDP).

Note: In addition to configuring single-sign on settings for PowerSchool, verify that your Schoolnet server is also configured for SSO. If it is not, a successful SSO connection between PowerSchool and Schoolnet cannot be established. For assistance, contact Schoolnet Client Solutions Center.

How to Configure PowerSchool Identity Provider Settings

Use this section to set up the SSO connection from PowerSchool to Schoolnet.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **Schoolnet SSO**. The Single Sign-On Setup for Schoolnet page appears.
6. Use the following table to enter information in the PowerSchool Identity Provider Settings fields:

   Note: All fields are required.

Field	Description
Name	The PowerSchool identity provider's name. The default is set to **PowerSchool IDP**.
Entity ID	The PowerSchool server's public URL. The value is automatically populated using the values entered on the Global Server Settings page (**System > System Settings > Global Server Settings > PowerSchool Configuration - External Access** fields). Verify this is the correct value and update if necessary.
Single Sign-On Certificate	Choose the certificate the PowerSchool IDP will use for single sign-on authentications.
View PowerSchool IDP Metadata	The PowerSchool IDP Metadata must match what is stored in Schoolnet. This information can be used to diagnose communication issues. 1. Click to view the PowerSchool identity provider's metadata. A separate window appears. 2. When done viewing, close the window.

7. Do one of the following:

- To continue, see Step 6 of *How to Configure Schoolnet Service Provider Settings*.
- Click **Save**. A confirmation message appears.

How to Configure Schoolnet Service Provider Settings

Use this section to configure PowerSchool to accept SSO requests from Schoolnet.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **Schoolnet SSO**. The Single Sign-On Setup for Schoolnet page appears.
6. Use the following table to enter information in the Schoolnet Service Provider Settings fields:

   Note: All fields are required.

Field	Description
Name	The Schoolnet service provider's name. The default is set to **Schoolnet**. **Note:** Do not change this value.
Base URL	Enter the Schoolnet service provider's base URL. The default is set to: **https://your.schoolnet.server.com**
Metadata URL	Enter the Schoolnet service provider's metadata URL. The default is set to: **https://your.schoolnet.server.com/samlsso/ServiceProvider.aspx**
Schoolnet Host Server and Port	Enter the Schoolnet service provider's host server and port. The default is set to: **https://your.schoolnet.server.com:443**

7. Click **Save**. A confirmation message appears.
8. To continue, see *How to Enable Schoolnet Single Sign-On*.

How to View PowerSchool User Identifying Elements for SSO

Use this section to view the SAML SSO Attributes used for establishing successful SSO connection between PowerSchool and Schoolnet.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **Single Sign-On Service**. The Single Sign-On Setup for Schoolnet page appears.
6. Use the following table to view information in the PowerSchool User Identifying Elements for Single Sign-On section:

Field	Description
firstName	The first name of the PowerSchool user-identifying element
lastName	The last name of the PowerSchool user-identifying element

Configure SAML Inline Authentication

Once you have configured the Event API, you can then configure SAML inline authentication allowing users to sign directly in to Schoolnet without using the SSO link within PowerSchool. For example, if an administrator bookmarks their My Schoolnet page and SAML Inline Authentication is configured, when the administrator clicks their bookmark, they will be able to sign directly in to Schoolnet.

How to Configure SAML Inline Authentication

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **SAML Inline Authentication**. The SAML Inline Authentication page for Schoolnet appears.

6. Use the following table to enter information:

Field	Description
User Types	PowerSchool user types for which SAML inline authentication may be configured: • Admin • Guardian • Student • Teacher
Allow SSO Authentication	Select the checkbox for each user type that you want to allow SSO authentication. Otherwise, leave blank.
Application Launch	For each user type that you have allowed SSO authentication, do one of the following: • Select the checkbox to indicate you want a new browser window to open when signing directly in to Schoolnet. • Deselect the checkbox to indicate you want Schoolnet to appear in the same browser window as PowerSchool when signing directly in to Schoolnet.

7. Click **Save**. The Schoolnet Setup page appears.

Configure PowerSchool Event Subscriptions

Once you have configured Schoolnet single sign-on settings, you can then configure the Event API so that it sends a delete notification each time a teacher deletes a Schoolnet-created assignment from the PowerTeacher Gradebook.

How to Configure PowerSchool Event Subscriptions

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.

3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **Event API Configuration**. The Event API Configuration for Schoolnet page for Schoolnet appears.
6. Use the following table to enter information in the Event API Configuration for Schoolnet section:

Field	**Description**
URL	Enter the subscriber's URL.
Authentication Type	The type of authentication used to authorize Schoolnet.
Access Token URL	Enter the URL used to obtain an access token. **Note:** The access token URL is used for both event API and Schoolnet web part authentication. **Note:** This field is required for parent single-sign on to the Schoolnet system.
Client ID	A value that uniquely identifies the plugin.
Client Secret	The account identifier associating the API client record to the client credentials.

7. Use the following table to view information in the Entity Events section:

Field	**Description**
Entity Name	The name of the PowerSchool table for which you have a subscription, such as PGASSIGNMENTS.
Events	The type of event for which you have a subscription, such as DELETE.

8. Click **OK**. The Schoolnet Setup page appears.

View Identity Attributes

Using the Identity Attribute Configuration page, you can view the unique identifier for an object.

Note: PowerSchool comes pre-configured with these settings. These settings may only be modified by PowerSchool Technical Support either by accessing the Identity Attribute Configuration page as a Maintenance User or by adding **plugin.console.is_identity_attr_config_enabled** with a value of **1** to the Prefs table (once modifications have been made, the pref then needs to be removed from the Prefs table). For assistance, contact PowerSchool Technical Support.

Note: Suggested default settings are for single-tenant environments. However, identity attributes may also be configured for multi-tenant environments. When configuring identity attributes, it is recommended that you either configure for a single-tenant environment or a multi-tenant environment, not both. "Single-tenant" refers to a single, district-wide instance of PowerSchool integrated with a single, district-wide version of Schoolnet. "Multi-tenant" refers to a district-wide PowerSchool integrated with a statewide or multi-district-wide version of Schoolnet.

How to View Identity Attributes

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **Identity Attribute Configuration**. The Identity Attribute Configuration page for Schoolnet appears.
6. Use the following table to view information on this page:

Field	Description
Students	The unique identifier of this object. By default, this is set to **STUDENTS-DCID**.
Users	The unique identifier of this object. By default, this is set to **TEACHERS-DCID**.

	Note: If configuring for a multi-tenant environment, choose **SIF_STATEPRID**.
Guardian	The unique identifier of this object. By default, this is set to **PARENT-GUARDIANID**.
Schools	The unique identifier of this object. By default, this is set to **SCHOOL_NUMBER**.
District	The unique identifier of this object. By default, this is set to **DISTRICT 0**.
Sections	The unique identifier of this object. By default, this is set to **DCID**.
Assignments	The unique identifier of this object. By default, this is set to **DCID**.

View OAuth Client Credentials

Using OAuth 2.0, PowerSchool secures the data exchange with Schoolnet by auto-generating client credentials. The client credentials are required for Schoolnet to retrieve an access token for data exchange. This is sensitive data and should be kept secure to prevent unauthorized access to PowerSchool data.

How to View OAuth Client Credentials

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Click **Schoolnet**. The Schoolnet Setup page appears.
5. Click **OAuth Configuration**. The OAuth Configuration page for Schoolnet appears.
6. Use the following table to view information on this page:

Field	**Description**
Client ID	A value that uniquely identifies the plugin.

Client Secret	The account identifier associating the API client record to the client credentials.

7. Click **OK**. The Schoolnet Setup page appears.

Enable Schoolnet Single Sign-On

Once you have configured PowerSchool event subscriptions, you can then enable Schoolnet single sign-on.

Note: By default, Schoolnet is not enabled.

How to Enable Schoolnet Single Sign-On

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.
4. Select the **Enable/Disable** checkbox for the Schoolnet plugin. The Enable Plugin drawer appears.
5. Review the content.

   Note: If you have installed a plugin that is dependent on page customizations, you must enable page customizations on the Customizations page. For more information, see *Customizations*.

   Note: If PowerSchool encounters errors with the plugin, detailed information about the errors appears and you may not proceed with enabling the plugin.

6. Click **Enable** to proceed. A confirmation message appears.
7. To enable Schoolnet for staff, see *Assign Schoolnet Roles to Staff*.
8. To enable Schoolnet for students, see *Enable Schoolnet for Students*.

How to Disable Schoolnet Single Sign-On

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Plugin Management Configuration**. The Plugin Management Dashboard page appears.

4. Deselect the **Enable/Disable** checkbox of the Schoolnet plugin. The Disable Plugin pop-up appears.
5. Click **Yes**. A confirmation message appears.

Configure Schoolnet Roles

Using Schoolnet roles, you can control the level of access given to PowerSchool users who access Schoolnet from within PowerSchool and PowerTeacher. By default, there are four predefined Schoolnet staff level roles that you can assign to PowerSchool users: Employee, Leadership, Staff, and Teacher. These roles should not be edited or deleted. In addition, you can create as many other roles as needed based on your district's needs.

How to Create a Schoolnet Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Schoolnet**. The Schoolnet Roles page appears.
4. Click **New**. The Edit Schoolnet Role page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Name	Enter the name of the role. **Note:** This name must match a name defined in Schoolnet.
Description	Enter a description of the role.
Enabled	Select the checkbox to enable the role. When enabled, the role appears on the Schoolnet Mapping for [Name] pop-up. Alternatively, deselect the checkbox to disable the role. When disabled, the role no longer appears on the Schoolnet Mapping for [Name] pop-up. **Note:** The Schoolnet Mapping for [Name] pop-up is accessible via **Manage Roles** on the Security Settings page.

6. Click **Submit**. A confirmation message appears.

How to Sort Schoolnet Roles

Use the following procedure to arrange the roles into the order in which you want the role to appear on the Schoolnet Roles page, as well as the Manage Roles pop-up on the Security Settings page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Schoolnet**. The Schoolnet Roles page appears.
4. Drag and drop the role you want to move. A message appears indicating the role is being updated.
5. Repeat Step 4 for each role you want to move. When you are done, the changes are automatically saved.

   Note: If a role is added, it appears as the last item in the sort order. If a role is deleted, the sort order is automatically updated and re-sequenced as needed.

How to Edit a Schoolnet Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Schoolnet**. The Schoolnet Roles page appears.
4. Click the name of the role you want to edit. The Edit Schoolnet Role page appears.
5. Edit information as needed. For field descriptions, see *How to Create a Role*.
6. Click **Submit**. A confirmation message appears.

How to Delete a Schoolnet Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Schoolnet**. The Schoolnet Roles page appears.
4. Click the name of the role you want to delete. The Edit Schoolnet Role page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Schoolnet Roles page appears.

Assign Schoolnet Roles to Staff

Once Schoolnet single sign-on is configured and enabled, you can then mass assign Schoolnet roles at the staff level for existing PowerSchool users, which allows PowerSchool users to launch Schoolnet from within PowerSchool and PowerTeacher based on their user roles.

To mass assign Schoolnet roles:

1. Generate a tab delimited text file for a selected group of PowerSchool staff members within a specified school or district.
2. Update the tab delimited text file to include the appropriate Schoolnet roles for each PowerSchool staff member.

   Note: Single school and role can also be assigned per user. This is done by listing the school number followed by a colon followed by the role. For example, 2125 Amy Bailey 3300401 0 3300401:Teacher. In this example, user Amy Bailey is assigned a Schoolnet Teacher role at school 3300401.

   Note: Multiple schools and roles can also be assigned per user. This is done by listing multiple school number role combinations separated by a semicolon. For example, 2125 Amy Bailey 3300401 0 3300402:Teacher;3300402:Leadership;3300401:Teacher;3300401:Leadership;3300400:Teacher. In this example, user Amy Bailey is assigned a Schoolnet Teacher and Leadership role at school 3300402, a Schoolnet Teacher and Leadership role at school 3300401, and a Schoolnet Teacher role at school 300400.

3. Import the updated tab delimited text file back into PowerSchool.

   Notes:

   - The schoolnetroles field is now available when using Quick Export or Export Using Template with the Teachers table.
   - Mass assigning Schoolnet roles can only be used for updating existing PowerSchool staff members. To import new PowerSchool staff members, contact PowerSchool Technical Support.
   - The import matches PowerSchool staff members by first name and last name. Therefore, it is recommended that PowerSchool staff members' names be unique. Otherwise, only the first record will be imported and any successive staff members with the same name will be rejected.
   - A maximum of 50 Schoolnet roles may be assigned to a PowerSchool staff member. Exceeding 50 Schoolnet roles per PowerSchool staff member may cause the import to fail.
   - For more information about importing and exporting, see the *Import and Export User Guide* available on PowerSource.

How to Generate a Tab Delimited Text File

To start, generate a tab delimited text file for a selected group of PowerSchool staff members within a specified school or district.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Export Using Template**. The Export Using Template page appears.
4. Choose **Schoolnet Staff Roles Export** from the **Export template** pop-up menu.
5. Click **Submit**. The following exported, tab delimited data appears:
   - teachers.id
   - teachers.first_name
   - teachers.last_name
   - teachers.schoolid
   - teachers.psaccess
   - teachers.canchangeschool
   - schoolnetroles

How to Update the File to Include Schoolnet Roles

Once you have generated the text file, you can then update the file to include the appropriate Schoolnet roles for each PowerSchool staff member.

1. Open the tab delimited text file.
2. For each existing staff member, enter the appropriate Schoolnet roles using the following format: schoolid:role;schoolid:role. Note that a colon separates schoolid and role and a semicolon separates each pair of schoolid and roles.

   Note: PowerSchool currently supports the following four predefined Schoolnet staff level roles: Employee, Leadership, Staff, and Teacher. At least one of these roles must be included for each staff member.

3. Save the export file.

How to Import Schoolnet Roles Using Quick Import

Once you have updated the file, you can then import the updated file back into PowerSchool.

When importing the file into PowerSchool, staff IDs included in the file are updated with their associated Schoolnet roles.

If any of the staff included in the file have existing Schoolnet roles associated to them, the values in the file override any existing Schoolnet roles in PowerSchool.

Note: You can also use the Import Using a Template function to import Schoolnet roles. For more information, see *How to Import Schoolnet Roles Using a Template*.

Note: While this procedure can be performed at the district level, it is recommended that you import Schoolnet roles at the school level. Upon signing in to PowerSchool, the name of your default school (or district) appears. Before beginning this procedure, be sure you have selected the school in which you want to work.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.

1. On the start page, click **School** in the navigation toolbar. The Schools pop-up menu appears.

   Note: You can enter the first couple of letters of the school to take you to a specific menu item.

2. Choose the school for which you want to import Schoolnet roles from the **School** pop-up menu. The navigation toolbar displays the name of the selected school.
3. Choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
4. Click **Importing & Exporting**. The Importing & Exporting page appears.
5. Click **Quick Import**. The Quick Import page appears.
6. Use the following table to enter information in the fields:

Field	Description
Table	Choose **Teachers** from the pop-up menu.
Field delimiter	Use the default setting of **Tab**.
End-of-line marker	Use the default setting of **CR** for carriage return.
Character Set	Use the default setting of **Mac Roman**.

File to import	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), navigate to the data file, and click **Open**.
Suggest field map	Use the default setting (checkbox selected).
School	Verify you have selected the school you want to import into.

7. Click **Import**. The Import Records from an ASCII Text File page appears.
8. Select the **Check to exclude first row** checkbox.
9. Select the **Update teacher records if an imported teacher number matches an existing teacher record** checkbox.
10. Click **Submit**. The Importing results page appears.
11. Verify that the imported Schoolnet roles appear correctly for each staff member on the Manage Schoolnet Roles for [Name] page. For detailed information, see *How to Assign Schoolnet Roles to an Individual Staff Member*.

How to Import Schoolnet Roles Using a Template

Note: You can also use the Quick Import function to import Schoolnet roles. For more information, see *How to Import Schoolnet Roles Using Quick Import*.

Note: While this procedure can be performed at the district level, it is recommended that you import Schoolnet roles at the school level. Upon signing in to PowerSchool, the name of your default school (or district) appears. Before beginning this procedure, be sure you have selected the school in which you want to work.

1. On the start page, click **School** in the navigation toolbar. The Schools pop-up menu appears.

   Note: You can enter the first couple of letters of the school to take you to a specific menu item.

2. Choose the school for which you want to import Schoolnet roles from the **School** pop-up menu. The navigation toolbar displays the name of the selected school.
3. Choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
4. Click **Importing & Exporting**. The Importing & Exporting page appears.
5. Click **Import Using Template**. The Import Using Template page appears.
6. Use the following table to enter information in the fields:

Field	Description
Import template	Choose **Schoolnet Staff Roles Import** from the pop-up menu. **Note:** Click template to link to the Templates for Importing page, where you can view, create, edit, and remove templates used for importing.
File to import	Either enter the data file path and name in the field or click **Browse...** to select the data file.

7. Click **Submit**. The Import Check: [data file name] page appears.
8. Select the **Skip This Row** checkbox.
9. Verify that the data correlates to the fields from the template. If it doesn't, click the link to modify the template. For more information, see *How to Edit an Import Template*. Otherwise, click **Import**. The Importing: [data file name] page appears, and the data is imported.

Assign Schoolnet Roles to Individual Staff Members

Once Schoolnet single sign-on is configured and enabled, you can then individually assign Schoolnet roles at the staff level, which allows PowerSchool users to launch Schoolnet from within PowerSchool and PowerTeacher based on their user roles.

How to Assign Schoolnet Roles to an Individual Staff Member

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.

   Note: For more information, see *Security Settings*.

3. Under Schoolnet Security, click **Manage Roles**. The Manage Schoolnet Roles for [Name] page appears.

   Note: The Schoolnet Security section only appears if Schoolnet has been enabled. See *How to Enable Schoolnet Single Sign-On*.

4. Use the following table to enter information in the fields:

Field	Description
Institution	All institutions within the district appear. The district office appears at the top of the list. The staff member's default school appears as the first school in the list. All other schools in the district appear in alphabetical order. If a school appears bold, the staff member has been given PowerSchool admin access to the school. See **May switch to** on the Security Settings page.
Schoolnet Role	The Schoolnet roles assigned to the staff member. **Note:** PowerSchool currently supports the following four predefined Schoolnet staff level roles: Employee, Leadership, Staff, and Teacher. At least one of these roles must be assigned to the staff member.
Actions	**District Office** If a role is added at the district office level, the role is added for all schools within the district and can only be modified at the district office level. To add roles at the district office level: 1. Click **Add Roles** next to District Office. The Add Schoolnet Roles to District Office pop-up appears. 2. Select the appropriate **System Roles** checkboxes. **Note:** At least one system role selection is required. 3. Select the appropriate **Additional Roles** checkboxes. **Note:** If no **System Roles** checkboxes are selected, the Additional Roles section appears shaded. Additional role selection is optional. 4. Click **OK**.

	To edit roles at the district office level: 1. Click **Edit** next to District Office. The Add Schoolnet Roles to District Office pop-up appears. 2. Edit information as needed. 3. Click **OK**. To remove all roles at the district office level, click **Clear** next to District Office. **[School]** If a role is added at the school level, the role is only added for the selected schools and can only be modified at the school level. To add roles at the school level: 1. Click **Add Roles** next to the appropriate school. The Add Schoolnet Roles to [School Name] pop-up appears. 2. Select the appropriate **System Roles** checkboxes. **Note:** At least one system role selection is required. 3. Select the appropriate **Additional Roles** checkboxes. **Note:** If no **System Roles** checkboxes are selected, the Additional Roles section appears shaded. Additional role selection is optional. 4. Select the **Apply** checkbox to copy the selected roles to all institutions that the staff member may switch to. 5. Click **OK**. To edit roles at the school level: 1. Click **Edit** next to the appropriate school. The Add Schoolnet Roles to [School Name] pop-up appears. 2. Edit information as needed. 3. Click **OK**. To remove all roles at the school level, click **Clear** next to the appropriate school.

5. Click **Submit**. A confirmation message appears.

Enable Schoolnet Student/Parent Access

Once Schoolnet single sign-on is configured and enabled, you can then enable Schoolnet at the student/parent level, which allows students/parents to launch Schoolnet from within the PowerSchool Student and Parent portal.

How to Enable Schoolnet for Students/Parents

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

   Note: If District does not appear in the main menu, click **School** in the navigation toolbar, and choose **District Office**.

2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Choose **Schoolnet Settings**. The Schoolnet Settings page appears.
4. Choose **Schoolnet Student Access Settings**. The Schoolnet Student Access Settings page appears.
5. Use the following table to enter information in the fields:

Field	Description
Enable Student Access	Select the checkbox to enable Schoolnet access for this district. Selecting the checkbox activates the school checkboxes. Alternatively, deselect the checkbox to disable Schoolnet access for this district. Deselecting the checkboxes deactivates the school checkboxes. **Note:** Selected schools are retained when Schoolnet access is disabled. If Schoolnet access is re-enabled, the previously selected schools are also re-enabled.
All Schools	Select the checkbox to enable Schoolnet access for all schools in the district.
[School]	Select the checkbox of each school for which you want to enable Schoolnet access.

6. Click **Submit**. A confirmation message appears.

Schoolnet

Once Schoolnet is configured, the Schoolnet link appears in PowerSchool, the PowerSchool Student and Parent portal, and PowerTeacher. Using the link, users can launch Schoolnet from within PowerSchool while keeping their PowerSchool session active allowing them to work in both applications simultaneously. Additionally, if SAML inline authentication settings have been configured, users may sign directly in to Schoolnet without using the SSO link within PowerSchool.

Launch Schoolnet in PowerSchool

Use this procedure to launch Schoolnet in PowerSchool.

Note: The Schoolnet link only appears if Schoolnet is enabled at the system level, at least one Schoolnet role has been assigned to you, and you are currently enrolled in at least one section.

Note: If you are a user who has access to multiple districts, you will only see information in Schoolnet for the district you are currently signed into in PowerSchool. To view information for a different district, log out of Schoolnet, sign out of PowerSchool, and then sign back into PowerSchool for that district.

How to Launch Schoolnet in PowerSchool

1. Sign in to PowerSchool.

   Note: For more information about signing in to PowerSchool, see *Sign In to PowerSchool*.

2. On the start page, choose **Schoolnet** under Applications in the main menu. Schoolnet launches the My Schoolnet page in a separate window (or tab depending on your browser setting).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. For detailed information, see the *Schoolnet online help*. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

3. When you are finished working in Schoolnet, be sure to log out of Schoolnet. A confirmation page appears indicating you have been successfully logged out of Schoolnet.

4. Do one of the following:
   - If you are finished working in PowerSchool, click **Sign Out of PowerSchool** to sign out of PowerSchool.
   - If you would like to continue working in PowerSchool, click **Return to PowerSchool**. The start page appears.

     Note: If on a multi-tenant environment, the PowerSchool Sign In page appears. If you would like to continue working in PowerSchool, sign in to PowerSchool.

Launch Schoolnet in the PowerSchool Student and Parent Portal

Use this procedure to launch Schoolnet in the PowerSchool Parent/Student portal.

Note: The Schoolnet link only appears if Schoolnet is enabled at the system, district, and school level, and you are signed in as a student.

How to Launch Schoolnet in the PowerSchool Student and Parent Portal

1. Sign in to the PowerSchool Student and Parent portal.

   Note: For more information about signing in to the PowerSchool Student and Parent portal, see the *PowerSchool Student and Parent Portal User Guide* available on PowerSource.

2. On the start page, click **Schoolnet** in the navigation menu. Schoolnet launches the My Schoolnet page in a separate window (or tab depending on your browser setting).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. For detailed information, see the *Schoolnet online help*. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in the PowerSchool Student and Parent portal, your session may time out. If so, you need to sign in again.

3. When you are finished working in Schoolnet, be sure to log out of Schoolnet. A confirmation page appears indicating you have been successfully logged out of Schoolnet.
4. Do one of the following:

- If you are finished working in the PowerSchool Student and Parent portal>, click **Sign Out of PowerSchool** to sign out of the PowerSchool Student and Parent portal.
- If you would like to continue working in the PowerSchool Student and Parent portal, click **Return to PowerSchool**. The start page appears.

  Note: If on a multi-tenant environment, the PowerSchool Sign In page appears. If you would like to continue working in PowerSchool, sign in to PowerSchool.

Launch Schoolnet in PowerTeacher

Use this procedure to launch Schoolnet in PowerTeacher.

Note: The Schoolnet link only appears if Schoolnet is enabled at the system level and at least one Schoolnet role has been assigned to you.

How to Launch Schoolnet in PowerTeacher

1. Sign in to PowerTeacher.

   Note: For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. On the start page, click **Schoolnet** in the navigation menu. Schoolnet launches the My Schoolnet page in a separate window (or tab depending on your browser setting).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. For detailed information, see the *Schoolnet online help*. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerTeacher, your session may time out. If so, you need to sign in again.

3. When you are finished working in Schoolnet, be sure to log out of Schoolnet. A confirmation page appears indicating you have been successfully logged out of Schoolnet.
4. Do one of the following:
   - If you are finished working in PowerTeacher, click **Sign Out of PowerSchool** to sign out of PowerTeacher.

- If you would like to continue working in PowerTeacher, click **Return to PowerSchool**. The start page appears.

  Note: If on a multi-tenant environment, the PowerSchool Sign In page appears. If you would like to continue working in PowerSchool, sign in to PowerSchool.

Launch Schoolnet in PowerTeacher Gradebook

Use this procedure to launch Schoolnet in PowerTeacher Gradebook.

Note: The Schoolnet link only appears if Schoolnet is enabled at the system level and at least one Schoolnet role has been assigned to you.

How to Launch Schoolnet in PowerTeacher Gradebook

1. Sign in to PowerTeacher.

   Note: For more information about signing in to PowerTeacher, see the *PowerTeacher User Guide* available on PowerSource.

2. Click **Gradebook**. The PowerTeacher Gradebook Launch page appears.
3. Click **Launch Gradebook**. A digital signature verification dialog appears.
4. Click **Trust**. PowerTeacher gradebook opens.

   Note: For more information about signing in to PowerTeacher Gradebook, see the *PowerTeacher Gradebook User Guide* available on PowerSource.

5. From the gradebook menu bar, choose **Tools > Schoolnet**. Schoolnet launches the My Schoolnet page in a separate window (or tab depending on your browser setting).

   Note: The window that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. For detailed information, see the *Schoolnet online help*. If the window does not launch, contact your school's PowerSchool administrator.

   Note: If you are not actively working in PowerTeacher, your session may time out. If so, you need to sign in again.

6. When you are finished working in Schoolnet, be sure to log out of Schoolnet. A confirmation page appears indicating you have been successfully logged out of Schoolnet.

7. Do one of the following:
   - If you are finished working in PowerSchool, click **Sign Out of PowerSchool** to sign out of PowerSchool.
   - If you would like to continue working in PowerSchool, click **Return to PowerSchool**. The start page appears.

     Note: If on a multi-tenant environment, the PowerSchool Sign In page appears. If you would like to continue working in PowerSchool, sign in to PowerSchool.

Sign In to Schoolnet as an Administrator

Use this procedure to sign directly in to Schoolnet as an Administrator without using the SSO link within PowerSchool.

Note: SAML inline authentication settings must be configured.

How to Sign In to Schoolnet as an Administrator

1. Open your Web browser to your school's Schoolnet URL. The Single Sign-On page appears.
2. Select your district from the pop-up menu.
3. Click **Continue**. The Single Sign-On page refreshes.
4. Click **Sign in as an Administrator**. The Administrator Sign In page appears.
5. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view PowerSchool from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters display as asterisks (*****) to ensure greater security when you sign in.

6. Click **Sign In**. Schoolnet launches.

   Note: Depending on SAML Inline Authentication settings, Schoolnet either replaces your existing browser window or opens in a new browser window.

Sign In to Schoolnet as a Student

Use this procedure to sign directly in to Schoolnet as a Student without using the SSO link within PowerSchool.

Note: SAML inline authentication settings must be configured.

How to Sign In to Schoolnet as a Student

1. Open your Web browser to your school's Schoolnet URL. The Single Sign-On page appears.
2. Select your district from the pop-up menu.
3. Click **Continue**. The Single Sign-On page refreshes.
4. Click **Sign in as a Student**. The Student and Parent Sign In page appears.
5. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view the PowerSchool Student and Parent Portal from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters appear as asterisks (*) to ensure greater security when you sign in.

6. Click **Sign In**. Schoolnet launches.

   Note: Depending on SAML Inline Authentication settings, Schoolnet either replaces your existing browser window or opens in a new browser window.

Sign In to Schoolnet as a Teacher

Use this procedure to sign directly in to Schoolnet as a Teacher without using the SSO link within PowerSchool.

Note: SAML inline authentication settings must be configured.

How to Sign In to Schoolnet as a Teacher

1. Open your Web browser to your school's Schoolnet URL. The Single Sign-On page appears.
2. Select your district from the pop-up menu.
3. Click **Continue**. The Single Sign-On page refreshes.
4. Click **Sign in as a Teacher**. The Teacher Sign In page appears.
5. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view PowerTeacher from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters appear as asterisks (*) to ensure greater security when you sign in.

6. Click **Sign In**. Schoolnet launches.

   Note: Depending on SAML Inline Authentication settings, Schoolnet either replaces your existing browser window or opens in a new browser window.

Assessments

Schoolnet and PowerTeacher gradebook work in combination with one another when Schoolnet-created assessments are shared with PowerTeacher gradebook. Shared Schoolnet-created assessments appear in PowerTeacher Gradebook as assignments. Using PowerTeacher Gradebook, you can then manage assessments as you would assignments.

Note: For more information about Schoolnet, see the *Schoolnet online help*. For more information about PowerTeacher gradebook, see the *PowerTeacher Gradebook User Guide* available on PowerSource.

Sharing

- To view a Schoolnet-created assessment in PowerTeacher gradebook, the assessment must be designated in Schoolnet as “shared” with PowerTeacher gradebook.
- If the assessment is changed from “shared” to “not shared” with PowerTeacher gradebook, and is not deleted, the assessment remains in both Schoolnet and PowerTeacher gradebook.
- Once the assessment is changed to “not shared” with PowerTeacher gradebook, any further updates to the assessment in Schoolnet are no longer sent to PowerTeacher gradebook.
- If the assessment is once again changed to “shared” with PowerTeacher gradebook, assessment updates are once again sent to PowerTeacher gradebook from Schoolnet.

Viewing

- Schoolnet-created assessments can be viewed in the PowerTeacher gradebook using the Assignments window or the Scoresheet Assignments window.
- Schoolnet-created assessments are identified with a downward pointing arrow in the lower-right corner of the assignment column header. When you hover the mouse over the column header, a pop-up displays assessment information, including where the assessment was created.

Updating

- If an assessment's due date or score is updated in Schoolnet after it first appears in PowerTeacher gradebook, the updated information is sent to PowerTeacher gradebook and overrides the existing due date or score.

Deleting

- Only an assessment that has yet to be completed by students can be deleted within Schoolnet.
- If an assessment is deleted in Schoolnet, the corresponding assessment is also deleted for all sections in the PowerTeacher gradebook.
- If an assessment is deleted for a section in the PowerTeacher gradebook, the Event API automatically sends a delete notification to Schoolnet. The corresponding assessment in Schoolnet is automatically set to not shared for that specific section.

Test Results

The Test Results page displays comprehensive information about a student's benchmark, classroom, and standardized test results.

Note: The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Test Results page, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.
Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system administrator for assistance.	Indicates one of the following: • Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

View Test Results in PowerSchool as Admin

Note: The Test Results page only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you.

How to View Benchmark Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
4. Choose the **School Year** from the pop-up menu. The following information appears for each benchmark test the student has taken:
    - Test Name and Description
    - Test Date
    - Test Score
    - Score Group
5. Click the name of the benchmark test to view test details.
6. Click the **Benchmark Tests** tab to return to list of benchmark tests.

    Note: For more information, see the *Schoolnet online help*.

How to View Classroom Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Classroom Tests** tab. Classroom tests for the selected student appear. The following information appears for each classroom test the student has taken:
    - Test Name and Description
    - Test Date
    - Test Score
    - Score Group
4. Click the name of a classroom test to view test details.
5. Click the **Classroom Tests** tab to return to list of classroom tests.

    Note: For more information, see the *Schoolnet online help*.

How to View Standardized Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Standardized Tests** tab. Standardized tests for the selected student appear.
4. Choose the **School Year** from the pop-up menu. The following information appears for each standardized test the student has taken:
    - Section

- Score Group
- Raw Score
- Scaled Score

5. Click the name of a standardized test to view test details.
6. Click the **Standardized Tests** tab to return to list of standardized tests.

   Note: For more information, see the *Schoolnet online help*.

View Test Results in PowerSchool as Counselor

Note: The Test Results page only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you.

How to View Benchmark Test Results

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Choose **Student Screens**. The Student Screens Menu page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose **Test Results** from the pop-up menu.
5. Click **Submit**. The Counselor page appears.
6. Click the name of the student you want to work with. The Test Results page appears.
7. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
8. Choose the **School Year** from the pop-up menu. The following information appears for each benchmark test the student has taken:
   - Test Name and Description
   - Test Date
   - Test Score
   - Score Group
9. Click the name of the benchmark test to view test details.
10. Click the **Benchmark Tests** tab to return to list of benchmark tests.

    Note: For more information, see the *Schoolnet online help*.

How to View Classroom Test Results

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Choose **Student Screens**. The Student Screens Menu page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose **Test Results** from the pop-up menu.
5. Click **Submit**. The Counselor page appears.
6. Click the name of the student you want to work with. The Test Scores page appears.
7. Click the **Classroom Tests** tab. Classroom tests for the selected student appear. The following information appears for each classroom test the student has taken:
   - Test Name and Description
   - Test Date
   - Test Score
   - Score Group
8. Click the name of a classroom test to view test details.
9. Click the **Classroom Tests** tab to return to list of classroom tests.

   Note: For more information, see the *Schoolnet online help*.

How to View Standardized Test Results

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Choose **Student Screens**. The Student Screens Menu page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose **Test Results** from the pop-up menu.
5. Click **Submit**. The Counselor page appears.
6. Click the name of the student you want to work with. The Test Scores page appears.
7. Click the **Standardized Tests** tab. Standardized tests for the selected student appear.

8. Choose the **School Year** from the pop-up menu. The following information appears for each standardized test the student has taken:
    - Section
    - Score Group
    - Raw Score
    - Scaled Score
9. Click the name of a standardized test to view test details.
10. Click the **Standardized Tests** tab to return to list of standardized tests.

    Note: For more information, see the *Schoolnet online help*.

View Test Results in the PowerSchool Student and Parent Portal

Note: The Test Results page only appears if Schoolnet is enabled at the system, district, and school level, and you are signed in as a student.

How to View Benchmark Test Results

1. On the start page, click **Test Results** from the navigation menu. The Test Results page displays.
2. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
3. Choose the **School Year** from the pop-up menu. The following information appears for each benchmark test the student has taken:
    - Test Name and Description
    - Test Date
    - Test Score
    - Score Group
4. If signed in as a parent, click the name of the benchmark test to view test details.
5. Click the **Benchmark Tests** tab to return to list of benchmark tests.

    Note: For more information, see the *Schoolnet online help*.

How to View Classroom Test Results

1. On the start page, click **Test Results** from the navigation menu. The Test Results page displays.
2. Click the **Classroom Tests** tab. Classroom tests for the selected student appear. The following information appears for each classroom test the student has taken:
    - Test Name and Description
    - Test Date
    - Test Score

- Score Group
3. If signed in as a parent, click the name of a classroom test to view test details.
4. Click the **Classroom Tests** tab to return to list of classroom tests.

   Note: For more information, see the *Schoolnet online help*.

How to View Standardized Test Results

1. On the start page, click **Test Results** from the navigation menu. The Test Results page displays.
2. Click the **Standardized Tests** tab. Standardized tests for the selected student appear.
3. Choose the **School Year** from the pop-up menu. The following information appears for each standardized test the student has taken:
   - Section
   - Score Group
   - Raw Score
   - Scaled Score
4. If signed in as a parent, click the name of a standardized test to view test details.
5. Click the **Standardized Tests** tab to return to list of standardized tests.

   Note: For more information, see the *Schoolnet online help*.

View Test Results in PowerTeacher

Note: The Test Results page only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you.

How to View Benchmark Test Results

1. On the Student Information page, choose **Test Results** from the **Select screens** pop-up menu. The Test Results page appears.
2. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
3. Choose the **School Year** from the pop-up menu. The following information appears for each benchmark test the student has taken:
   - Test Name and Description
   - Test Date
   - Test Score
   - Score Group
4. Click the name of the benchmark test to view test details.
5. Click the **Benchmark Tests** tab to return to list of benchmark tests.

Note: For more information, see the *Schoolnet online help*.

How to View Classroom Test Results

1. On the Student Information page, choose **Test Results** from the **Select screens** pop-up menu. The Test Results page appears.
2. Click the **Classroom Tests** tab. Classroom tests for the selected student appear. The following information appears for each classroom test the student has taken:
    - Test Name and Description
    - Test Date
    - Test Score
    - Score Group
3. Click the name of a classroom test to view test details.
4. Click the **Classroom Tests** tab to return to list of classroom tests.

Note: For more information, see the *Schoolnet online help*.

How to View Standardized Test Results

1. On the Student Information page, choose **Test Results** from the **Select screens** pop-up menu. The Test Results page appears.
2. Click the **Standardized Tests** tab. Standardized tests for the selected student appear.
3. Choose the **School Year** from the pop-up menu. The following information appears for each standardized test the student has taken:
    - Section
    - Score Group
    - Raw Score
    - Scaled Score
4. Click the name of a standardized test to view test details.
5. Click the **Standardized Tests** tab to return to list of standardized tests.

Note: For more information, see the *Schoolnet online help*.

Security User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

Everyone who uses PowerSchool, the PowerSchool Student and Parent portal, PowerTeacher, PowerTeacher Substitute and PowerTeacher Gradebook must have a username and confidential password. Users can belong to user groups to make page permissions easier to manage. In addition, you can restrict access to PowerSchool by specific IP addresses to further promote security.

For more information about PowerSchool security, see the following sections:

- *Security Permissions*
- *Substitute Sign In Settings*
- *Sign In Attempts Restrictions*
- *IP Address Restrictions*

Setup

System Security

Use this page to modify system-level security settings. The settings relate to several security settings in PowerSchool, including the amount of time that can pass before a PowerSchool or the PowerSchool Student and Parent portal user is automatically signed out of the system due to inactivity; the default security level for a page when no page-specific security is set; and setting for remote support access. For more information, see *Security*.

Note: Any change will take effect on the next server restart.

How to Set System Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Security**. The Security Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Maximum number of concurrent user sessions	Enter the maximum number of user sessions that can occur on PowerSchool simultaneously. **Note:** Approximately 40k of memory are used per 100 sessions.
Maximum number of concurrent student sessions	Enter the maximum number of student sessions that can occur on the PowerSchool Student and Parent portal simultaneously.
Maximum number of concurrent parent sessions	Enter the maximum number of parent sessions that can occur on the PowerSchool Student and Parent portal simultaneously. For more information, see *PowerSchool Student and Parent Portal Administration*.

Allow users to restore session that have been timed out due to inactivity	Click the switch to **On** to allow users to restore session that have been timed out due to inactivity. Alternatively, click the switch to **Off** to disable this feature. **Note:** By default, the switch is set to **Off**.
Sign Out Administrative Users After This Many Minutes Of Inactivity	Enter the number of minutes that can pass before a PowerSchool user is automatically signed out of the system due to inactivity. This setting applies to PowerSchool, PowerTeacher, and PowerTeacher Substitute. If a value is entered, users will see one of the following messages when their sessions are close to timing out: • Several minutes before timeout, the user will see "You are about to be signed out due to inactivity. Click **Stay Signed In** or anywhere on this page to continue." • When session timeout is detected, the user will see "You have been signed out. Return to **Sign In Page**."
Sign Out Parent Users After This Many Minutes Of Inactivity	Enter the number of minutes that can pass before a PowerSchool Student and Parent portal user is automatically signed out of the system due to inactivity. For more information, see *PowerSchool Student and Parent Portal Administration*. If a value is entered, users will see one of the following messages when their sessions are close to timing out: • Several minutes before timeout, the user will see "You are about to be signed out due to inactivity. Click **Stay Signed In** or anywhere on this page to continue." • When session timeout is detected, the user will see "You have been signed out. Return to **Sign In Page**."
Unless Specified Otherwise for an Individual Screen, Groups Have This Level Of Access	Enter a default level of access for all users for individual pages. For each user group, you can define their level of access on every PowerSchool page.

Enable MyData Download for Parents	The MyData button is a joint project between the Office of Educational Technology and the White House Office of Science and Technology Policy that, among other goals, allows access to student data in order to create a personal learning profile that is easily portable. PowerSchool provides parents with the ability to download their students' data, including grades and attendance, in an XML-formatted file. Click the switch to **On** to display the MyData button on the PowerSchool Student and Parent portal. Alternatively, click the switch to **Off** to disable this feature. **Note:** The MyData button requires that PowerSchool is running on SSL (Secure Sockets Layer), ensuring that the data transmission is secure.
Enable PowerSchool Session Cookies to span Subdomains	If the PowerSchool session cookie needs to be submitted by the browser to another server/identity provider running on a different subdomain than the PowerSchool server for integration with external systems, click the switch to **On** to enable PowerSchool session cookies to span subdomains. If enabled, the PowerSchool session cookie will be sent by the browsers to the subdomains of the specified domain. For example, if PowerSchool is running on powerschool.com and you specify powerschool.com as the domain, then the PowerSchool session cookie will be submitted to all the subdomains of powerschool.com, such as school.powerschool.com or district.powerschool.com. Alternatively, click the switch to **Off** to disable this feature.
PowerSchool Domain	If the **Enable PowerSchool Session Cookies to span Subdomains** checkbox is selected, enter the valid domain name on which PowerSchool is running, such as myschooldistrict.com. **Note:** The PowerSchool Session Cookies to Span Subdomains feature will not work without a valid domain name.
Disable Remote Support	Click to disable remote support with no time limit.

Enable Remote Support	Click to enable remote support with no time limit. **Remote Support Security:** PowerSchool strongly recommends that SSL be enabled on your PowerSchool server to ensure all data passed between your server and PowerSchool Technical Support remains secure and private. If SSL is not enabled, data moving between your server and PowerSchool is unencrypted. For more information, see the *SSL Configuration* section of the *Installation Guide* available on PowerSource.
Temporarily Enable Remote Support	Click to enter start and end dates for remote support access. The following fields appear. • **Starting Date** - Enter a start date or click the calendar icon to select a date. • **Ending Date** - Enter an end date or click the calendar icon to select a date. **Note**: Date format must be one of the following: • mm/dd/yyyy • mm/dd/yy • m/d/yyyy • m/d/yy • mm-dd-yyyy • mm-dd-yy • m-d-yyyy • m-d-yy

5. Click **Submit**. The System Settings page appears.

Security Permissions

In PowerSchool, system users are considered staff members. All PowerSchool system users must be added as staff members before you can assign security permissions. When adding new staff members, you can assign permissions, as needed. Additionally, you can assign permissions by user group or set permissions at the page level. For more information about assigning permissions by user group, see *Group Security Permissions*.

When user permissions are enabled for both PowerTeacher Administrator and ReportWorks, the user account is shared. Therefore, the username and password are the same for PowerSchool, PowerTeacher Administrator, and Report Works. Due to the shared account, the PowerTeacher Administrator and ReportWorks applications cannot run simultaneously. Be sure to set appropriate PowerSchool group and page permissions for these users. For more information, see *How to Edit a Staff Member Security Settings* and *How to Set Page-Level Permissions*.

To set up new system users, see *Add New Staff Members*. To edit or delete an existing system user account, see *How to Edit Staff Member Security Settings*.

Page-Level Permissions

To define each user group's access to individual pages within PowerSchool, use the page permissions function. The **Modify Access Privileges for this Page** link appears on every page when the page permissions are activated.

By clicking the link, you can define the access level for only that page (None, View Only, View and Modify) for each user group. If you do not define the page-level access for each group, the system uses the default access level you originally defined for the group on the Edit Group page. For more information, see *How to Edit a Staff Member Security Settings*.

After defining the access level for every group on every page, return to this page to deactivate the page permissions function.

How to Enable Page Permissions Access

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Access to Page Permissions**. The Access to Page Permissions page appears.
3. Choose **On** from the **Turn modify permissions** pop-up menu.
4. Click **Submit**. The Security page appears.
5. Proceed to *How to Set Page-Level Permissions*.

How to Set Page-Level Permissions

1. Navigate to the PowerSchool page for which you want to define permissions.
2. Click **Modify access privileges for this page**. The Access Privileges drawer appears.
3. Use the following table to enter information in the fields:

Field	Description

Filter	Enter one of more search terms in the **Filter** field to narrow the list of groups. Otherwise, leave blank.
Set All Groups To	To set the level of permissions for all groups, choose one of the following: • **Group default**: Level determined as the group default on the Edit Group page for each group. For more information, see *How to Edit Security Groups*. • **None**: No access to the page. • **View-only**: Can read but not modify the information on the page. • **Full**: Can read and modify information on the page. **Note:** This setting works with the filter so that only visible (non-filtered) groups are set.
Group	The name of the group.
Level of Access	To set the level of permissions for a particular group, select one of the following options for the group: • **Group default**: Level determined as the group default on the Edit Group page for each group. For more information, see *How to Edit Security Groups*. An (N), (V) or (F) appears next to the group indicating the level of permission for the group (None, View-only, Full). • **None**: No access to the page. • **View-only**: Can read but not modify the information on the page. • **Full**: Can read and modify information on the page.

4. Click **Submit**. A confirmation message appears. The page reappears.
5. Close the Access Privileges drawer.
6. Proceed to *How to Disable Page Permissions Access*.

How to Disable Page Permissions Access

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Access to Page Permissions**. The Access to Page Permissions page appears.
3. Choose **Off** from the **Turn modify permissions** pop-up menu.
4. Click **Submit**. The Security page appears.

Field Level Security

The Field Level Security feature provides easy-to-use tools for the PowerSchool Administrator to configure and manage field level security for PowerSchool and PowerTeacher fields that need to be limited. Users can be granted Full Access, View Only, or No Access to specific fields. It helps accomplish the following goals:

- Protect PII (Personally Identifiable Information) so that unauthorized users cannot see or access it.
- Protect data integrity by limiting who can edit specific fields, even though some other users may need to view the information.

Note: For more information about common usage scenarios and provides details on how to use FLS in customizations by utilizing DATs, tlist and conditional statements, see Knowledgebase article 71873 available on PowerSource.

Page Level Security vs. Field Level Security

Field Level Security is not a substitute for Page Level Security, but rather complimentary to it. Users are never given more access than is granted at the page level. For example, if a user has Field Level Security set to "Full Access" on a particular field, but the page is set to "View Only" for that user, then the user will only be granted "View Only" access to the field on that page. Since Page Level Security only affects a single page, it is possible for a user to have full edit access on another page for the same field. There are some pages in PowerSchool that do not enforce FLS. These pages should continue to be secured through Page Level Security where possible:

- Autosend
- Import
- Family Management
- ReportWorks
- Reports utilizing the SRP platform.

  Note: The SRP security mechanism can be used to secure these reports.

- Reports utilizing the Reporting Engine where fields are called without DATs
- PowerTeacher Gradebook
- Health

  Note: The health module has feature-level security in the Security Group settings.

- New Student Enrollment
- Transfer Out of School/Transfer Student Out

User Access Roles

User Access Roles are required to take advantage of Field Level Security. By themselves, roles are nothing more than a label. It is what you do with a role that gives it meaning in PowerSchool. Roles are very powerful tools allowing you to setup advanced security scenarios when mixed with Security Groups, Page Level Security and FLS. Users can have multiple roles tied to each of their school affiliations accommodating unique security configurations. All security roles are additive, meaning that for any particular setting users are given the highest level of access granted to any of their roles. For example, if a user has a role configured for No Access to the SSN field, but they have another role configured for View Only access, the effective security on SSN will be View Only.

Other Important Notes

- It is not recommended to set name fields to No Access. However, it is okay to secure name fields as View Only to prevent editing, but names will not be fully protected from displaying, as they are necessary for PowerSchool to function properly. Additionally, the ^(lastfirst) DAT will not be protected.
- There are some special purpose pages where users will still be able to view data even if their field access level is set to No Access. System administrators are expected to utilize Page Level Security to restrict access to these pages. For a current list of the specific areas that do not enforce field level security, see Knowledgebase article 71873 available on PowerSource.
- Existing tlist_sql tags used in custom pages that do not include the new FLS method tags will not be secured until they are updated with these new keywords. It is advised that you update any tlist_sql tags on custom pages that you need to be secure by FLS. For more information, see Knowledgebase article 71873 available on PowerSource.
- Many Student Contacts fields are stored in another table and synced with the Students table (for example, Students.Emerg_Phone_1 is synced with PhoneNumber.PhoneNumberAsEntered). In these cases, the FLS rules for these fields are defined on the source table (PhoneNumber.PhoneNumberAsEntered) and not the synced table. For a complete list of Student Contact fields that are synced

from other source tables, see Knowledgebase article 71873 available on PowerSource.

How to View Field Level Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Field Level Security**. The Field Level Security page displays the following information:

   Note: Click the arrow in the column heading to sort in ascending order. Click again to sort in descending order.

Field	Description
Field Name	The name of the field. **Note:** For a list of fields that are available to be secured through the Field Level Security system, see Knowledgebase article 72328 available on PowerSource.
Table	The PowerSchool table in which the field resides.
Field Security	If a checkmark appears, field level security has been applied to this field. If a checkmark does not appear, field level security has not been applied to this field.
Actions	Click to **Edit** icon to modify field level security for the field. For more information, see *How to Modify Field Level Security*.

How to Modify Field Level Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Field Level Security**. The Field Level Security page appears.
3. Click the **Edit** icon. The Edit [Field Name] drawer appears.
4. Use the following table to enter information in the User Access Security section:

Field	Description

Access	The level of permission granted to users in this role for the selected field: • Full Access - When a field is set to this setting, the field appears editable. • View Only - When a field is set to this setting, the field appears as read-only. • No Access - When a field is set to this setting, the field appears with asterisks.
Roles	The roles that have been assigned access.
Edit	1. Click to **Edit** icon to modify roles for a given access level. The Edit Roles pop-up appears. 2. Select the checkbox next to each role that you want to assign to the access level. 3. Click **OK**. The Edit Roles pop-up closes. The selected roles(s) appears in the Roles column. **Note:** A role can only be assigned to one access level. Roles will automatically be removed from any previous access level when added to a new level.
Everyone Else	The level of permission for everyone else. This setting affects all users that are not added to one of the other security levels for a field even if they do not have role associations. If no roles are configured with security exceptions, this value is automatically set to **Full Access**.

6. Click **Submit**. The Field Level Security page appears. Note a checkmark now appears in the field security column.

How to Add an Extended Schema Field to Field Level Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Field Level Security**. The Field Level Security page appears.
3. Click **Add**. The Add Fields to Set Security drawer appears.

4. Use the following table to enter information in the fields:

Field	Description
Choose Table	Choose the extended schema table you want to select fields from the pop-up menu. The Choose Fields field displays all fields for the selected extended schema table.
Choose Fields	Select the checkbox next to each field within the extended schema table you want to add to the Field Level Security page.

6. Click **Add Fields**. The Field Level Security page displays the additional field(s).

How to Delete an Extended Schema Field from Field Level Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Field Level Security**. The Field Level Security page appears.
3. Click the **Delete** icon. The Delete [Field Name] pop-up appears.
4. Click **OK**. The Delete [Field Name] pop-up closes. The Field Level Security page no longer displays the deleted field.

Plugin Security

The Plugin Security section of the [Field Name] drawer displays the plugin roles that have been granted access to the selected field. Access to the field by a plugin can only be approved or rejected by a PowerSchool Administrator when a plugin is enabled. If you need to change a plugin's access to a specific field, you must work with the plugin developer to change the field access list within the plugin xml.

When the [Field Name] drawer only displays the Plugin Security section and does not also display the User Access Security section, this indicates that the field is not a core Field Level Security field that can be secured using User Access roles. Fields of this type are only secured to plugins when those plugins are enabled and have been granted access to the field by a PowerSchool Administrator.

For more information on a plugin's access to specific fields and how these fields are listed within the plugin xml, see the *Plugin Management User Guide* and the *PowerSchool Developer Site* available on PowerSource.

How to View Plugin Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Field Level Security**. The Field Level Security page appears.
3. Click the **Edit** icon. The Edit [Field Name] drawer appears.
4. Use the following table to view information in the Plugin Security section:

Field	**Description**
Access	The level of permission granted to users in this plugin role for the selected field: • Full Access - When a field is set to this setting, the field appears editable. • View Only - When a field is set to this setting, the field appears as read-only. • No Access - When a field is set to this setting, the field appears with asterisks.
Roles	The plugin roles that have been assigned access.

6. Click **Submit**. The Field Level Security page appears. Note a checkmark now appears in the field security column.

Group Security Permissions

PowerSchool users and staff members are assigned to groups to simplify the process of assigning and modifying permissions. Though users have the default permissions of the user group to which they belong, you can modify these permissions per user. For more information about modifying individuals' permissions, see *How to Edit a Staff Member Security Settings*.

How to Edit Security Permissions by Group

Edit the permissions of staff members and PowerSchool users.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Security, click **Users by Group**. The Users by Group page appears.
3. Click the name of the user in the User Name column. The Edit Staff Security Info page appears.
4. Edit information as needed. For field descriptions, see *How to Edit Staff Member Security Settings*.
5. Click **Submit**. The Changes Recorded page appears.

How to Add Security Groups

Based on your district's needs, you can add up to 500 security groups. Adding security groups in small batches allows you to prefix the security group with a meaningful name that can help you to sort and manage security groups more easily.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.
3. Click **Add Groups**. The Add Security Groups page appears.
4. Use the following table to enter information in the fields:

Field	Description
Current Number of Security Groups	The current number of security groups appears. **Note:** This field is read-only.
Number of Groups to Add	Enter the new number of security groups. The new total number of security groups appears. The minimum value that you can enter is 1. The maximum value you can enter is 500, which includes the current number of groups. For example, if the current number of groups is 100, the maximum value you can enter is 400. **Note:** This field is required.
Prefix Group Names With	Any groups that are created will use this prefix, followed by the number of the group. For example, if the current number of security groups is 50 and the number of security groups is increased to 55, then "Group 51, Group 52, Group 53, Group 54, Group 55" are created. Do one of the following • Use the default prefix setting of **Group [space].**

	• Replace the default prefix setting with your own prefix.
Group Name Preview	Group names appears based on the number of groups you added and the prefix you entered. Confirm that the group name is correct prior to submitting.

6. Click **Submit.** The Groups page appears along with a confirmation message.

How to Edit Security Groups

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.
3. To narrow the list of groups, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click a name in the Group Name column. The Edit Group page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Copy Security Permissions	See *How to Copy Security Permissions*.
Group Number	The number of the group appears. **Note:** PowerSchool supports up to 500 security groups. For more information, see *How to Add Security Groups*.
Group Name	Edit the name of the group.
Access Level	Use the pop-up menu to choose a level of permission used as the default permissions for users in this group: • **No Access** • **View Only** • **View & Modify**

Page Level Permissions	See *How to View/Edit Overridden Page Permissions*.
Can Modify Schedules	Use the pop-up menu to choose a level of permission for modifying schedules: • **Yes, in any year** • **No, not at all** • **Only for [school years]**
PowerScheduler Access	Select the checkbox if users in this group can use the master scheduler features.
Language Translator	Select the checkbox if users in this group can use the language translator feature. **Note:** For more information, see *Enable Language Translator Security Permissions*.
Analytics Access	Select the checkbox to allow users in this group to access Analytics. **Note**: This field only displays if Analytics is enabled. For more information, see *Enable Analytics*.
Report Queue Priority	Select the report queue priority level for this group. The report queue priority determines which reports run first, based on the user who submitted the report request. For example, a group with the priority level of 10 is the near-highest level of priority for running reports. Only groups with the level of zero would have higher priority.
Accessible Log Types	Select the checkbox next to each log type that you want to be accessible to users in this group. Click **Check All** to select all checkboxes. Click **Uncheck All** to deselect all checkboxes. **Note:** The **Check All** and **Uncheck All** buttons only appear if there are multiple log type checkboxes.

Accessible Incident Types	Select the checkbox next to each incident type that you want accessible to users in this group. **Note:** Set up Incident Types at the district level. For more information, see *Incident Types*.
Health and Immunization	Use the **Certification** pop-up menu to choose a level of permission for the Grade Level Entry Certifications tab on the District Setup Health page: • **No Access** • **View Only** • **View/Modify** • **View/Modify/Delete** Use the **Immunization** pop-up menu to choose a level of permission for the Immunizations tab on the District Setup Health page: • **No Access** • **View Only** • **View/Modify** Use the **Office Visit** pop-up menu to choose a level of permission for the Office Visits tab on the District Setup Health page: • **No Access** • **View Only** • **View/Modify** • **View/Modify/Delete** Use the **Screening** pop-up menu to choose a level of permission for the Screenings tab on the District Setup Health page: • **No Access** • **View Only** • **View/Modify** • **View/Modify/Delete** **Note:** Security for the setup Health Management pages is controlled through page-level permissions. For more information,

	see *Page-Level Permissions* in the *Health Management Permissions* section.
Accessible Student Screens	Select the checkbox next to each student screen that you want to be accessible to users in this group. Click **Check All** to select all checkboxes. Click **Uncheck All** to deselect all checkboxes. **Note:** The Check All and Uncheck All buttons only appear if there are multiple student screen checkboxes. The gateway to the student screens is the Quick Lookup page. Only the student screen checkboxes selected here appear as links in the main menu. If a user group is denied all access to the student screens, the system displays a message indicating access denied. If you disable access to a student screen that a user has already set as his or her default screen, the system generates an error when the user navigates to the student area. He or she can remedy this by selecting a new default screen using the Personalize function. If a security group was able to access certain student screens prior to this software update, it will still be able to do so.

7. Click **Done**. The Edit Group page appears.

How to Copy Security Permissions

Use the **Copy Security Permissions** function to copy page permissions settings and group security settings from one group to another.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.
3. Click a name in the Group Name column. The Edit Group page appears.
4. Click **Copy Security Permissions**. The Copy Security Permissions to Other Group pop-up appears.
5. Use the following table to enter information in the From Group section:

Field	**Description**
From [Name] Group	Indicates the group you selected on the previous page and the level of access.

Group Security Settings	Select the checkbox to copy group security settings. Group security settings are set using the Edit Group page. **Note:** This checkbox may be selected in addition to the **Page Permissions Settings** checkbox.
Page Permissions Settings	Select the checkbox to copy page permission settings. Page permission settings are set using the Access Privileges page on individual pages. **Note:** This checkbox may be selected in addition to the **Group Security Settings** checkbox.

7. Use the following table to enter information in the To Groups section:

Field	**Description**
Filter	To narrow the list of groups, begin entering the name of the group for which you want to copy security settings to.
Select All	Do one of the following: • Select the checkbox to select all groups displayed. • Deselect the checkbox to deselect all groups displayed. **Note:** This setting works with the filter so that only visible (non-filtered) groups are set.
[Individual Group]	The number, name, and default access level of each group appears. Select the checkbox of each group that you want to copy the security settings to. **Note:** Click a column heading to sort in ascending order. Click again to sort in descending order.

8. Click **Copy Settings**. The Confirm Copy Security Permissions page appears.

   Note: If copying page permissions where the From Group has an access level of None or View-Only and all groups in PowerSchool are selected as To Groups, the following message appears, "You are attempting to copy a value of [View Only or No Access] to all groups. You will not be able to proceed until at least one group retains access." appears. Click **OK**.

9. Review the From Group, To Group information.

   Note: Copying security settings or page permissions will replace those settings of the groups you copy to.

10. If accurate, click **Submit**. A confirmation message appears.

    Note: If copying page permissions would result in one or more pages being locked out, the following message appears, "Some page permissions could not be copied because at least one user needs full access to these pages. Click here to modify the permissions to these pages manually." Click **here**. The Page Permissions that can't be Copied pop-up appears. Click the page link to adjust the page permissions for that page. The Access Privileges page appears in a separate tab on your browser. Edit the information as needed. When you click Submit, the tab on your browser closes. Repeat for each page for which you want to adjust the page permissions. When done, close the Page Permissions that Can't be Copied pop-up.

How to View/Edit Overridden Page Permissions

Use the **Overridden Page Permissions** function to view and edit pages that have a permission set to a specific level instead of the Group Access Level.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Groups**. The Groups page appears.
3. To narrow the list of groups, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click a name in the Group Name column. The Edit Group page appears.
5. Click **Overridden Page Permissions**. The Overridden Page Permissions page appears.
6. Use the following table to enter information in the From Group section:

Field	**Description**
Filter	To locate a page, begin typing. The list of pages narrows as you enter more text.

Set All Pages To	To set all pages (on the Overridden Page Permissions page) to a specific permission level, choose one of the following from the pop-up menu: • **Group default** - Level determined as the group default on the Edit Group page for each group. For more information, see How to Edit Security Groups. • **None** - No access to the page. • **View-only** - Can read but not modify the information on the page. • **Full** - Can read and modify information on the page. **Note:** To apply, click **Submit**.
[Page]	The name of the page that has a permission set to a specific level. To define user group access: 1. Click the name of the page. The Access Privileges page appears. 2. Update the level of access for each group as needed. For field description, see *How to Set Page-Level Permissions*. 3. Click **Submit**. A confirmation message appears. 4. Close the Access Privileges page.
[Permission]	The specific permission level the page is set to. To edit, click the permission and choose one of the following from the pop-up menu: • **Group default** - Level determined as the group default on the Edit Group page for each group. For more information, see How to Edit Security Groups. • **None** - No access to the page. • **View-only** - Can read but not modify the information on the page. • **Full** - Can read and modify information on the page. **Note:** Once a page has been modified, the line item appears gray and a message displays indicating you have unsaved changes.

8. Click **Submit**. A confirmation message appears.

   Note: When visiting these pages they may only partially render. These links are only to be used to alter page level permissions, and not for entering data.

Substitute Sign In Settings

Substitute teachers at your school can use PowerTeacher Substitute to enter attendance and lunch counts for the classes they are covering. In order for substitute teachers to sign in to PowerTeacher Substitute, you will need to provide them with the school's PowerTeacher Substitute URL, the name of the school, the name of the teacher for whom you are substituting, and a password. For more information, see the PowerTeacher Substitute online help or the *PowerTeacher Substitute User Guide*.

How to Set Substitute Sign In Settings

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Sub Sign In Settings**. The Substitute Sign In Settings page appears.
3. Use the following table to enter information in the fields:

Field	Description
Sub Sign In Password	Enter the substitute password.
Include current date?	Select the checkbox to include the current date as a prefix to the password.

4. Click **Submit**. The School Setup page appears.

IP Address Restrictions

Use this function to restrict PowerSchool permissions to certain IP addresses. Depending on the network used to access PowerSchool, this can limit the PowerSchool permissions to only selected computers.

How to Restrict IP Addresses

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **IP Address Restrictions**. The IP Address Restrictions page appears.
3. Click **New**. The Edit IP Address Range page appears.
4. Use the following table to enter information in the fields:

Field	Description
Start of IP Range	Enter the starting IP address in the range.
End of IP Range	Enter the ending IP address in the range.

6. Click **Submit**. The IP Address Restrictions page appears.
7. Repeat steps 4-6 for each IP address range.

How to Edit IP Address Restrictions

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **IP Address Restrictions**. The IP Address Restrictions page appears.
3. Click the IP address in the Start of IP Range column that you want to edit. The Edit IP Address Range page appears.
4. Use the following table to edit information in the fields:

Field	Description
Start of IP Range	Edit the starting IP address in the range.
End of IP Range	Edit the ending IP address in the range.

6. Click **Submit**. The IP Address Restrictions page displays the edited IP address range.

How to Delete IP Address Restrictions

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **IP Address Restrictions**. The IP Address Restrictions page appears.
3. Click the IP address in the Start of IP Range column that you want to delete. The Edit IP Address Range page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Sign In Attempts Restrictions

Restrict the number of times an administrative user can unsuccessfully attempt to sign in to PowerSchool. Restricting sign in attempts is a security precaution to minimize the risk of unauthorized persons entering your PowerSchool system. To remove the restriction, reset the user's disabled IP address.

How to Restrict Sign In Attempts

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Sign In Attempts Restrictions**. The Sign In Attempts Restrictions page appears.
3. Use the following table to enter information in the fields:

Field	Description
Disable IP address	Select the checkbox to activate the function.
Failed sign in attempts	Enter the number of failed sign in attempts possible.
Send security e-mail notification to	Enter the email address of the person monitoring security.

5. Click **Submit**. The Sign In Attempts Restrictions page displays the new settings.
6. Restart the server to activate the settings.

How to Reset Disabled IP Addresses

Reset a user's IP address after being disabled from too many unsuccessful sign in attempts.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Sign In Attempts Restrictions**. The Sign In Attempts Restrictions page appears.
3. Click **View Disabled IP Addresses**. The Disabled IP Addresses page appears.
4. Click an IP address to reset that address and enable additional sign in attempts. The Edit Disabled IP Address page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Delete page appears.

State Report Security

Using the Edit State Report Security page, you can restrict access to certain PowerSchool state reports to further promote security. When working with the access restriction matrix, note the following:

- Restrict Report Access must be enabled in order to edit the access restriction matrix.
- A checkmark indicates that a security group can access a report.
- A circle with a line through it indicates that a security group cannot access a report. If restrictions have been applied, the circle with a line through appears in the Reports cell, the security group cell, and the report name cell.
- A pencil indicates that access restrictions have been modified from their original state but have not yet been saved. If restrictions have been modified, the pencil appears in the Reports cell, the security group cell, and the report name cell.
- Use the access restriction matrix scroll bars to see portions of the access restriction matrix that are not within view.
- Access restrictions that have been modified from their original state appear highlighted until you click **Refresh** or **Submit**.

How to Edit State Report Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **State Report Security**. The Edit State Report Security page appears.
3. Use the following table to enter information in the fields:

Field	Description

<table>
<tr><td>Restrict Report Access</td><td>Do one of the following:
Choose Yes from the pop-up menu to enable the access restriction matrix. When enabled, restrictions can be applied.
Choose No from the pop-up menu to disable the access restriction matrix. When disabled, all security groups have access to all reports. This is the default setting.</td></tr>
<tr><td>Reports</td><td>In the first cell of the header row, Reports appears.
To edit all reports for all security groups:
When hovering over the Reports cell, all security groups and all reports appear highlighted.
Double-click the Reports cell to toggle the access restriction.</td></tr>
<tr><td>[Security Group]</td><td>In the subsequent cells of the header row, the name of each security group appears.
To edit all reports for a selected security group:
When hovering over a security group cell, all reports for the selected security group appear highlighted.
Double-click the security group name to toggle the access restriction.</td></tr>
<tr><td>[Report Category]</td><td>In the first column, the name of each report category appears in alphabetically ascending order.
To edit all reports within a report category for all security groups:
When hovering over a report category cell, all reports within the report category and all security groups appear highlighted.
Double-click the report category cell to toggle the access restriction.</td></tr>
</table>

	To edit all reports within a report category for a security group: 1. When hovering over a column cell in the report category row, all reports within the report category for the respective security group appear highlighted. 2. Double-click the column cell in the report category row to toggle the access restriction.
[Report Name]	In the first column, report names appear under their respective report categories in alphabetically ascending order. To edit a report for all security groups: 1. When hovering over a report name cell, all security groups appear highlighted. 2. Double-click the report name cell to toggle the access restriction. To edit a report for a security group: 1. When hovering over the intersecting cell of a report and security group, the cell appears highlighted. 2. Double-click the intersecting cell of the report and security group to toggle the access restriction.

5. Do one of the following:
    - Click **Refresh** to revert any pending changes highlighted.
    - Click **Submit** to save your changes.

    A confirmation message appears.

6. Click **OK**.

Unified Classroom Setup

Use the Unified Classroom Setup page to enable and configure Unified Classroom.

Important: When Unified Classroom is enabled, it relies on changes to Teachers/pw.html and public/pw.html. Districts who have customized the Sign In pages, will need to update these pages with the latest changes before enabling Unified Classroom.

Note: The Unified Classroom Setup page is only accessible at the district level for PowerSchool hosted customers.

Note: When Unified Classroom is enabled, existing student, parent, and teacher usernames cannot be modified in both the PowerSchool admin portal, as well as the PowerSchool Student and Parent portal. If a username has not been entered, one may be entered. However, once submitted, it cannot be modified.

How to Enable and Configure Unified Classroom

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Unified Classroom Setup**. The Unified Classroom Setup page appears.
3. Use the following table to enter information in the fields:

Field	Description
Enable Unified Classroom	Select the checkbox to enable Unified Classroom. When enabled, teachers, students and parents will be able to sign in to Unified Classroom. Alternately, deselect the checkbox to disable Unified Classroom. A confirmation message appears. Click **Yes** to proceed. When disabled, teachers, students and parents will no longer be able to sign in to Unified Classroom.
Redirect Teachers to the Unified Classroom Sign In	Select the checkbox to redirect teachers to the Unified Classroom when they sign in to the PowerTeacher portal. A confirmation message appears. Click **Yes** to proceed. **Note:** This setting in only applicable if the **Enable Unified Classroom** checkbox is selected.
Redirect Students and Parents to the Unified Classroom Sign In	Select the checkbox to redirect students and teachers to the Unified Classroom when they sign in to the PowerSchool Student and Parent portal. A confirmation message appears. Click **Yes** to proceed. **Note:** This setting in only applicable if the **Enable Unified Classroom** checkbox is selected.

Unified Classroom External Hostname	The protocol, hostname and port for the common portal URL. The default is set to **https://classroom.powerschool.com**. **Note:** This setting in only applicable if the **Enable Unified Classroom** checkbox is selected and you are in Test Server mode. For more information about Test Server mode, contact PowerSchool Hosting.

4. Click **Submit**. A confirmation message appears.

Roles Administration

Roles Administration provides you with a central location from which to manage roles.

Roles Administration Page

Using the Roles Administration page, you can view and edit roles for Schoolnet, Co-Teaching, and User Access.

Note: This procedure may only be performed at the district level.

How to Access the Roles Administration Page

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Use the following table to enter information in the fields:

Field	Description
Schoolnet	Click to view and edit Schoolnet roles. For more information, see *Schoolnet*.
Co-Teaching	Click to view and edit Co-Teaching roles. For more information, see *Co-Teaching*.
User Access	Click to view and edit User Access roles. For more information, see *User Access*.

User Access Roles

User Access Roles provide PowerSchool administrators with the ability to create roles specifically for their system's use. User Access Roles control user access to PowerSchool or external applications, such as PowerSchool Independent Software Vendor (ISV) systems. When a role is created, you can assign a PowerSchool security group to that role. This role can then be used to override the default security group for a user within a specific school context.

Note: There are two types of User Access Roles: Roles with a PowerSchool security group associated to them, and roles without a security group. Typically, roles created without a PowerSchool security group associated to them are the roles used to uniquely identify a user to an external application. Roles without a PowerSchool security group associated to them can be simply labels, or they can have field-level security or document attachment access restrictions. If they are simply labels, they provide flexibility in identifying the user to an external system, but they do not affect the users access within PowerSchool. Roles with a PowerSchool security group associated to them directly control the access the user has within PowerSchool.

It is important to understand that the security group is the backbone of a role that is used for PowerSchool access. A role that has a PowerSchool security group can be used to override a user’s default security group for any school affiliation. Users can have multiple role/group combinations for each of their schools but can only have one default security group. If a user has no roles with a PowerSchool security group, PowerSchool recognizes the user's default security group.

For more information on assigning roles, see *Staff Security Settings*.

Managing User Access Roles

How to Create a User Access Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Click **New**. The Edit User Access Role page appears. By default, the Definition tab is selected.
5. Use the following table to enter information in the fields:

Field	Description

Name	Enter the name of the role.
Description	Enter a description of the role.
Enabled	Select the checkbox to enable the role. Alternatively, deselect the checkbox to disable the role. When disabled, the role can still be assigned to a user, however PowerSchool will treat the role as if it does not exist. Disabled roles are preceded with a “Disabled:” prefix.
PowerTeacher Pro Read Only Admin Access	Select this checkbox to allow read-only access to PowerTeacher Pro.
Manage Locked Reporting Terms	Select the checkbox to allow this user role to change the PowerTeacher Pro Lock Reporting Term settings, or manually unlock individual sections.
User can set up and run system-level scheduled exports (bypasses all user-level security)	Select the checkbox to allow users assigned to this role to set up and run system-level scheduled exports. Alternatively, deselect the checkbox if you do not want to permit users assigned to this role to set up and run system-level scheduled exports. **Note:** Scheduled exports always run at the system-level and do not enforce user-level security.
Security group assigned to the role	Select the security group you want to assign to this role. This security group will override the user default security group when this role is associated to a school on the user account. For more information, see *Role Assignments*. **Note:** Once a security group is assigned to a PowerSchool role, a different security group may be assigned to the PowerSchool role, but not removed altogether (blank). **Note:** When editing, this field appears disabled if the role selected is an external role that has already been assigned to a user.

Categories	Using document attachment categories, you can control user access of document attachments by associating categories with roles. By default the **Use Default** checkbox is selected for all roles when a document attachment category is created. For more information about creating categories, see *Document Attachment Categories*. 1. To modify the permissions for a document attachment category, click the **Edit** icon. The Categories - Set Category Permissions drawer appears. 2. Select one or more of the following: • Select the **Download** checkbox to allow a user to download attachments for a given category. • Select the **Update Details** checkbox to allow a user to edit attachments for a given category. • Select the **Delete** checkbox to allow a user to delete attachments for a given category. 3. Click **Ok**. The Categories - Set Category Permissions drawer closes. **Note:** If all permissions on a given category are removed from a role, including **Use Default**, users assigned that role will have no access to documents with that category (even when other roles assigned to the user would have otherwise granted them access).
Group	The Groups listed describe specific role capabilities. These capabilities are often created by and for a specific plugin or PowerSchool feature. The PowerSchool Product Access group gives SSO link access to specific PowerSchool products for users who have a role with this capability enabled. For example, when enabled, the Learning Management System Access capability will display to the user the SSO link to PowerSchool Learning (when that product is installed and enabled at the user's school). Select the checkboxes for which you want to enable role capabilities. **Note:** Only role capabilities for enabled plugins display.

6. Click **Submit**. A confirmation message appears.

How to Edit a User Access Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Click the name of the role you want to edit. The Edit User Access Role page appears. By default, the Definition tab is selected.
5. Edit information as needed. For field descriptions, see *How to Create a User Access Role*.

   Note: One of the following messages may appear if the **Enabled** checkbox is deselected:

   "This role is associated with fields in the field level security setup area. These associations will be disabled if you continue." For information, see *Field Level Security*.

   "This role is associated with users on the Staff Security Settings page. These associations will be disabled if you continue. If this is a user's only role at a school, then their PowerSchool security will revert to their default security group for that school. The following users will be affected: [List of Users]." For information, see *Admin Access Roles*.

   "User and field level security is associated with this role. These associations will be disabled if you continue. If this is a user's only role at a school, then their PowerSchool security will revert to their default security group for that school. The following users will be affected: [List of Users]." For information, see *Field Level Security* and *Admin Access Roles*.

6. Click **Submit**. A confirmation message appears.

How to Enable PowerSchool Learning User Access

Enable access to PowerSchool Learning for teachers. The PowerSchool Learning plugin must be enabled to provide access to the application. For more information, see *PowerSchool Learning*.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.

3. Click **User Access**. The User Access Roles page appears.
4. Click the name of the role you want to edit. The Edit User Access Role page appears. By default, the Definition tab is selected.
5. Select the **PowerSchool Learning Access** checkbox.
6. Click **Submit**. A confirmation message appears.

How to Delete a User Access Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Click the name of the role you want to delete. The Edit User Access Role page appears. By default, the Definition tab is selected.
5. Click **Delete**.

   Note: One of the following messages may appear:

   "This role is associated with fields in the field level security setup area. These associations will be permanently deleted if you continue." For information, see *Field Level Security*.

   "This role is associated with users on the Staff Security Settings page. These associations will be permanently deleted if you continue. If this is a user's only role at a school, then their PowerSchool security will revert to their default security group for that school. The following users will be affected: [List of Users]." For information, see *Admin Access Roles*.

   "User and field level security is associated with this role. These associations will be permanently deleted if you continue. If this is a user's only role at a school, then their PowerSchool security will revert to their default security group for that school. The following users will be affected: [List of Users]." For information, see *Field Level Security* and *Admin Access Roles*.

6. Click **Confirm Delete**. The User Access Roles page appears.

How to Define Export/Edit Settings

Using the Export/Edit tab on the Edit User Access Roles page, you can define which data sources a user can export and/or edit. These access levels only apply to exporting, previewing and editing via the Data Export Manager. For step-by-step information, see *How to Define Export/Edit Settings*.

How to Define Enterprise Reporting Settings for User Access Roles

Using the Enterprise Reporting tab on the Edit User Access Roles page, you can define which categories of Enterprise Reports published within PowerSchool a user can access. In addition, users assigned to this role may be granted permission to Manage Enterprise Reports, which allows them to view, add, edit, and remove new or existing Enterprise Reports from within PowerSchool. These access levels only apply to Enterprise Reporting. For step-by-step information, see *How to Define Enterprise Reporting Settings for User Access Roles*.

How to Configure the User Access Matrix View

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Click **Configure Table**. The User Access Configure Matrix View page appears.
5. Use the following table to enter information in the fields:

Field	Description
Description	The description entered for the role appears.
Short Name	For each permission, enter the text you want to display on the column heading on the User Access Roles page.
Show in Matrix	For each permission, do one of the following: • Select the checkbox to display the permission on the User Access Roles page. • Deselect the checkbox to hide the permission.

6. Click **Submit**. A confirmation message appears.

How to Sort User Access Roles

Use the following procedure to arrange the roles into the order in which you want the roles to appear on the User Access Roles page.

Note: This procedure may only be performed at the district level.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.
4. Drag and drop the role you want to move. A message appears indicating the role is being updated.
5. Repeat Step 4 for each role you want to move. When you are done, the changes are automatically saved.

   Note: If a role is added, it appears as the last item in the sort order. If a role is deleted, the sort order is automatically updated and re-sequenced as needed.

How to Search for Staff by User Access Roles

Using the Search Staff function, you can search for staff members that are assigned to a particular role.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. In the **Search Staff** field, enter the role of a staff member whose record you want to review using the format Role.useraccess= [Role Name].

   Note: Leading and trailing spaces are removed from the value for which you are searching, embedded spaces are not, and considered part of the term to match.

3. Click the **Search** icon. Staff members associated to the role appears.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

Assign User Access Roles to Individual Users

Roles can be assigned to individual teacher or staff member on the Admin Access and Roles tab of the Staff Security Settings page. Teacher and staff members can have multiple school affiliations. Each school affiliation can have a different role assignment. Note that all roles assignments are configured on the Admin Access and Roles tab, whether the user is a teacher or administrative staff. For more information, see *Admin Access and Roles*.

Mass Assign User Access Roles to Selected Group of Users

Using the Mass Assign/Remove User Access Roles function, you can assign or remove roles to multiple teachers or staff members. Be sure to review the security settings for the roles you want to mass assign to ensure you are providing the correct security settings for each staff member.

Notes:

- User Access Roles with and without an associated PowerSchool security group may be assigned to a user at any given time. Typically, user access roles with a PowerSchool security group associated to them are assigned to control the user's access within PowerSchool. User access roles without a PowerSchool security group associated to them are used to identify the user to an external application, such as a PowerSchool Independent Software Vendor (ISV) system.
- When a user has a default access group assigned at a school, that default will be overwritten by the mass-assigned users access roles. A user with exiting user access roles will not have those roles overwritten during mass assignment. Additional roles that are mass assigned to the user will be added to their existing list of roles. When accessed at the district level, user access roles with a PowerSchool security group associated to them are only assigned to users at the schools they already have access to within PowerSchool.
- When accessed at the district level, user access roles without a PowerSchool security group associated to them are assigned to users at all the schools that have been selected, regardless of whether or not the user has access to that school within PowerSchool. This gives the external system the option to permission users more flexibly, and not be constrained by the user's PowerSchool access.
- This page is also accessible via **System >** Under Security, **Mass Assign User Access Roles**.

How to Mass Assign User Access Roles at the School Level

1. On the start page, click **Staff**. The Search Staff page appears.
2. Search for multiple staff members. The Select A Staff Member page appears.
3. Click **Functions**. The Group Staff Functions page appears.
4. Click **Mass Assign/Remove User Access Roles.** The Mass Assign User Access Roles page appears.
5. Do one of the following:
    - Click the **Roles With Security Groups** tab to assign roles that control the users' PowerSchool access.

- Click the **Roles Without Security Groups** tab to assign roles typically used to identify the users in external applications that are integrated with PowerSchool.

6. Use the following table to enter information in the fields:

Field	Description
Mass assign User Access Roles with () selected teachers	The selected staff members appear as the current selection.
Possible Roles	Indicate which roles you want to assign. To assign a role: 1. Select the role you want to assign. **Note:** To select multiple roles, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each role. 2. Click the single arrow pointing right. To assign all roles, click the double arrows pointing right.
Selected Roles	The roles selected from the Available User Access Roles list appear. To remove a role from this list: 1. Select the role you want to remove. **Note:** To select multiple roles, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each role. 2. Click the single arrow pointing left. To remove all roles from this list, click the double arrows pointing left.

7. Click **Assign**. A confirmation message appears.

How to Mass Remove User Access Roles at the School Level

1. On the start page, click **Staff**. The Search Staff page appears.
2. Search for multiple staff members. The Select A Staff Member page appears.

3. Click **Functions**. The Group Staff Functions page appears.
4. Click **Mass Assign/Remove User Access Roles.** The Mass Assign User Access Roles page appears.
5. Do one of the following:
    - Click the **Roles With Security Groups** tab to remove roles that control the users' PowerSchool access.
    - Click the **Roles Without Security Groups** tab to remove roles typically used to identify the users in external applications that are integrated with PowerSchool.
6. Select the role you want to remove from the Selected Roles box.

   Note: To select multiple roles, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each role.

7. Click **Remove**.
8. Click **Confirm Delete**. A confirmation message appears.

How to Mass Assign User Access Roles at the District Level

1. On the start page, click **Staff**. The Search Staff page appears.
2. Search for multiple staff members. The Select A Staff Member page appears.
3. Click **Functions**. The Group Staff Functions page appears.
4. Click **Mass Assign/Remove User Access Roles.** The Mass Assign User Access Roles page appears.
5. Use the following table to enter information in the Add User Access Roles pop-up fields:

Field	Description
Step 1: Schools	1. Select the checkbox next to each school you want to assign roles to for the selected staff members. **Note:** If your external applications do not need to distinguish a user's roles within each school, you can select **External Systems** as the school. This is not an official school, but simply a way to group all external application roles under one heading. **Note:** You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection.

	2. Click **Next**.
Step 2: Roles	1. Select one of the following options: • **Use Roles With Security Groups** to assign roles that control the users' PowerSchool access. • **Use Roles Without Security Groups** to assign roles typically used to identify the users in external applications that are integrated with PowerSchool. **Note:** If roles with a PowerSchool security group associated to them are selected, they will only be assigned to users at schools where the selected users already have PowerSchool admin access. If the users currently have Default Group access to a school it will be replaced by the role assignments made here. 2. Select the checkbox next to each role you want to assign to this group of staff members. **Note:** The security group associated to the role appears in parenthesis. **Note:** You can also press SHIFT while selecting multiple roles, which automatically selects all roles between your first and last selection. 3. Click **OK**.

Note: Once all roles have been assigned, the **Add** button appears shaded.

6. Click **Assign**. A confirmation message appears and the role assignments display on the page.

How to Mass Remove User Access Roles at the District Level

1. On the start page, click **Staff**. The Search Staff page appears.
2. Search for multiple staff members. The Select A Staff Member page appears.
3. Click **Functions**. The Group Staff Functions page appears.
4. Click **Mass Assign/Remove User Access Roles.** The Mass Assign User Access Roles page appears.

5. Use the following table to enter information in the Add User Access Roles pop-up fields:

Field	Description
Step 1: Schools	1. Select the checkbox next to each school you want to remove roles from for the selected staff members. **Note:** To unassign the user account with roles used for external systems, select **External Systems**, and select any roles that apply. Roles assigned to External Systems do not grant access to any PowerSchool school or district regardless of the PowerSchool Security Group. **Note:** You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection. 2. Click **Next**.
Step 2: Roles	1. Select one of the following options: • **Use Roles With Security Groups** to remove roles that control the users' PowerSchool access. • **Use Roles Without Security Groups** to remove roles typically used to identify the users in external applications that are integrated with PowerSchool. **Note:** If roles with a PowerSchool security group associated to them are selected, they will be removed from users at the selected schools if they exist, but, if the last role with a security group is removed from a user for a given school, the user will revert to Default Group access at that school. This is done to prevent admin users from losing their admin access. 2. Select the checkbox next to each role you want to remove for this group of staff members. **Note:** The security group associated to the role appears in parenthesis.

	Note: You can also press SHIFT while selecting multiple roles, which automatically selects all roles between your first and last selection. 3. Click **OK**.

6. Click **Remove**.
7. Click **Confirm Remove**. A confirmation message appears and the role assignments display on the page.

Co-Teaching

Co-Teaching provides PowerSchool administrators with the ability to assign multiple lead and additional staff/teachers to a section. The teacher-of-record is the lead teacher, and other staff/teachers are the "additional" teachers.

The administrator can select additional teachers, indicating the role, the percent allocation to the role, and the start and end dates, along with an optional note for each teacher.

A visual indicator is available on several pages in PowerSchool to alert you that more than one teacher shares a section. A Section Teachers icon appears next to a shared section on the Quick Lookup, Bell Schedule, and Modify Schedule pages.

If a section is shared between multiple teachers, teachers can generate section-specific reports even if they are not the lead teacher of a section in PowerTeacher gradebook. For more information, see the *PowerTeacher Gradebook User Guide* available on PowerSource. Some System Reports in PowerSchool will display section and teacher association data. For more information, see *System Reports.*

Co-Teaching Roles

PowerSchool comes with default roles, which should be sufficient for most configurations. If additional roles are needed, you may set up roles with the applicable access for PowerTeacher portal and PowerTeacher gradebook.

Once the roles are defined, you can assign the roles to teachers and staff on the affected section. For more information, see *Assign Teachers to a Section*.

Using Co-Teaching roles, you can control the level of access given to teachers who access PowerTeacher. By default, there are four predefined roles that you can assign to teachers: Lead Teacher, Co-Teacher, Teacher Aide, and Observer. You can edit or delete any of these roles except for the special “Lead Teacher” role. You can create as many other roles as needed based on your district’s needs.

Using the Co-Teaching Roles page, you can view the role assignment at a glance. A chart displays each role and the assigned properties.

Using the on the Co-Teaching Configure Matrix View page, you can customize which role assignments appear on the Co-Teaching Roles page, as well as edit the names of the properties assigned to each role.

How to Create a Co-Teaching Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Co-Teaching**. The Co-Teaching Roles page appears.
4. Click **New**. The Edit Co-Teaching Role page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Name	Enter the name of the role, such as Teacher's Aide.
Description	Enter a description of the role.
Enabled	Select the checkbox to enable the role. Alternatively, deselect the checkbox to disable the role. **Note:** Disabling a role only prevents it from being selected for newly added teachers. Any teacher already assigned a role that has been disabled will continue to show as assigned to the role for reporting purposes
View sections in PowerTeacher	Select the checkbox to allow this role to view sections in PowerTeacher portal.
View sections in PowerTeacher Gradebook	Select the checkbox to allow this role to view sections in PowerTeacher Gradebook.
Edit sections in PowerTeacher Gradebook	Select the checkbox to allow this role to edit sections in PowerTeacher Gradebook.
Access sections past the end date	Select the checkbox to allow this role to access sections past their role end date. When this option is enabled, the level of access persists on the assigned section until a new role for the teacher is assigned.

Display this role in Parent/Student Portal	Select the checkbox to display this role in the PowerSchool Student and Parent portal.
Display this role in PowerSchool Admin	Select the checkbox to display this role in PowerSchool.
Display this role in PowerTeacher	Select the checkbox to display this role in PowerTeacher portal.
Display this role on reports	Select the checkbox to display this role on reports.
Default allocation percent	Enter the default allocation percent for this role.
Reference code	Enter a reference code for this role.
Alt. code 1	Enter an alternate code for this role.
Alt. code 2	Enter an alternate code for this role.

6. Click **Submit**. A confirmation message appears.

How to Sort Co-Teaching Roles

Use the following procedure to arrange the roles into the order in which you want the role to appear on the Co-Teaching Roles page, as well as the Manage Roles pop-up on the Section Edit page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Co-Teaching**. The Co-Teaching Roles page appears.
4. Drag and drop the role you want to move. A message appears indicating the role is being updated.
5. Repeat Step 4 for each role you want to move. When you are done, the changes are automatically saved.

Note: If a role is added, it appears as the last item in the sort order. If a role is deleted, the sort order is automatically updated and re-sequenced as needed.

How to Edit a Co-Teaching Role

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Co-Teaching**. The Co-Teaching Roles page appears.
4. Click the name of the role you want to edit. The Edit Co-Teaching Role page appears.
5. Edit information as needed. For field descriptions, see *How to Create a Role*.
6. Click **Submit**. A confirmation message appears.

How to Delete a Co-Teaching Role

Note: Roles can only be deleted if they are not in use anywhere in PowerSchool. If the role is assigned to a teacher, it will need to be reassigned to another role before you will be able to delete.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Co-Teaching**. The Co-Teaching Roles page appears.
4. Click the name of the role you want to edit. The Edit Co-Teaching Role page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Co-Teaching Roles page appears.

How to Configure the Co-Teaching Matrix View

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **Co-Teaching**. The Co-Teaching Roles page appears.
4. Click **Configure Table**. The Co-Teaching Configure Matrix View appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Short Name	Enter the text you want to display on the column heading on the Co-Teaching Roles page. Maximum length is 100 characters.

Show in Matrix	Next to the applicable assignment, do one of the following: • Select the checkbox to display the role assignment on the Co-Teaching Roles page. • Deselect the checkbox to hide the role assignment.

6. Click **Submit**. The Co-Teaching Roles page appears.

Monitor Activity

Current Users

The Current Users page displays information about users that are currently signed in to PowerSchool, including their name, IP address, and time they last signed in to the system.

How to View a List of Current Users

The list of current users is view-only for all users.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Current Users**. The Current Users page appears.
3. Use the following table to understand the information in the fields:

Field	Description
Type	The user group that this user belongs to appears.
User	The name of the user appears.
Sign In	The time the user last signed in to the system appears.
Hits	The number of page item requests since the user last signed in to the system appears.
Last	The time of user's last hit appears.
IP Address	The user's computer IP address appears. This field also displays the user's operating system and Web browser type and version.
Platform	The user's hardware system.
Browser	The user's software application used to locate and display Web pages.

Staff User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool make is easy to manage your faculty and staff. From the PowerSchool start page, which serves as the central point to begin your activities, you can search for staff, browse for staff, view the staff directory, add a new staff member, or edit an existing staff member.

Staff Search

Just as it is often necessary to search for students to view or edit student information, you will periodically need to search for staff. For frequently used searches, utilize the Stored Searches function. For more information, see *Staff Stored Searches*.

Search Staff Page

To search for staff, simply click the **Staff Search** link in the main menu. The main part of the start page will then display the Staff Search function.

Search Staff

The following information can be used to search for staff:

Field	Description
[Search Staff]	Enter search criteria in the search field. If Smart Search is enabled, as you begin entering your search criteria, PowerSchool automatically provides a drop-down list of suggestions that you may choose from. For more information, see *Smart Search*. Use the pop-up menu to choose the type of staff member. To select from all staff groups, choose **All**. For more information, see *How to Search for All Staff Members*. **Note:** If you do not have field level security access to certain staff fields, you cannot search for staff using those fields. For more information, see *Field Level Security*.
[Search Icon]	Click to initiate the search.
View Field List	Click to view the Field List pop-up, which displays a list of all fields that can be used to perform a staff search. For more information, see *How to Search for Staff by Other Fields*. **Note:** Database extension fields can be selected on the **Field List** pop-up, but any associated one-to-many tables are not searchable at this time. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.

How to Search	Click to learn about searching. When you finish your review, either click **Back** on the Web browser or click the **Staff** link in the main menu.

Browse Staff

The following information can be used to browse for staff:

Field	**Description**
[Alphabet]	Click a letter of the alphabet to display a list of staff whose last names begin with the selected letter. For example, if you click **B**, the system displays the staff at your school whose last names begin with a "B". For more information, see *How to Search for Staff by Last Name*.
Teachers	Click to display a list of all teachers at your school. For more information, see *How to Search for All Teachers*.
Staff	Click to display a list of all staff members at your school. For more information, see *How to Search for All Staff*.
Lunch Staff	Click to display a list of all lunch staff at your school. For more information, see *How to Search for All Lunch Staff*.
Substitutes	Click to display a list of all substitutes at your school. For more information, see *How to Search for All Substitutes*.
[Gender]	Click **M** to display a list of all the male staff members at your school. Click **F** to display a list of all the female staff members at your school. For more information, see *How to Search for Staff by Gender*.

Other Options

When searching for staff, the following other options are available for selection:

Field	Description
New Staff Entry	Click to add a new staff member to your school. For more information, see *How to Add a New User*.
Staff Directory	Click to view the staff directory. For more information, see *Staff Directory*.
Stored Searches	Click to create or work with a saved list of preset search criteria used to quickly find groups of staff members. For more information, see *Staff Stored Searches*.

How to Search for All Staff Members

This is the easiest search, but it also produces the largest number of results.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **All** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page appears.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for All Teachers

Note: Alternatively, you can click the **Teachers** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Teachers** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all teachers, staff, lunch staff, and substitutes at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for All Staff

Note: Alternatively, you can click the **Staff** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Staff** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all staff members at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for All Lunch Staff

Note: Alternatively, you can click the **Lunch Staff** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Lunch Staff** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all lunch staff members at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for All Substitutes

Note: Alternatively, you can click the **Substitutes** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Substitutes** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all substitutes at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for Staff by Last Name

Note: Alternatively, you can click a letter of the alphabet to view all staff members whose last name begins with that letter.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. In the **Search Staff** field, enter the last name of a staff member whose record you want to review.

   Note: Alternatively, enter just the first few letters of the staff member's last name; however, this produces more records.

3. Use the pop-up menu to choose the type of staff member. To select from all staff groups, choose **All**.
4. Click the **Search** icon. If you search for a staff member who has a unique last name, the search displays the one record it finds. If you search for a staff member who has a common last name, a list of staff members appears.
5. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for Staff by Gender

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Enter either **gender=m** or **gender=f** in the **Search Staff** field.
3. Use the pop-up menu to choose the type of staff member. To select from all staff groups, choose **All**.
4. Click the **Search** icon. The Select a Staff Member page displays the male or female staff members.
5. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Search for Staff by Other Fields

Like many other applications, PowerSchool stores data in fields. A field is a unit of information defined by your PowerSchool administrator. PowerSchool comes with a set of standard fields used by all schools, but your school can add other fields that are particular to your needs. Additionally, fields are added to the field list with new versions of PowerSchool. Click to display a list of all teacher-related fields stored in your school's PowerSchool database.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

5. Click the **Search** icon. The Select a Staff Member page displays the staff members that meet the criteria you entered.

   Note: If you search for a staff member who has a value for a field matching no other staff's value, the search displays the one record it finds.

6. Click the name of the individual whose record you want to review, or, to work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work with Staff Groups*.

How to Select a Group of Teachers by Hand

This selection process is helpful to select a group of teachers from a larger group allowing you to narrow your search results even further.

1. On the start page, search for and select a group of staff members.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Select Teachers By Hand** to narrow the group of teachers even further. The Select Teachers By Hand page appears.
4. Press and hold COMMAND (Mac) or CONTROL (Windows) and click the names of the teachers to include in the group.

   Note: If the teachers are listed consecutively, click the first name on the list. Press SHIFT as you click the last name on the list. This selects the first and last names you click and every name in between.

Alternatively, if you are selecting the majority of the teachers on the list, select the teachers you do not want to keep and select the **Remove selected teachers** option. If you are selecting only a few of the teachers on the list, select the **Keep selected teachers** option.

5. Click **Functions**. The Group Staff Functions page appears. For more information about the group staff functions, see *Work with Staff Groups*.

Staff Stored Searches

Use stored searches to repeatedly search for groups of staff members. Set up and save the search or use a search that someone else has set up.

How to Create a Stored Staff Search

Create a new group of staff members for whom you and other users can search. To create a stored search that is similar to another stored search, copy a command string from another search and paste it into a new search group. You must then make the necessary changes or additions to the command string for the new group.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.
5. Enter a field operator and value after the field in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click **Stored Searches**. The Stored Staff Searches page appears.
7. Click **New**. The Edit Stored Staff Search page appears.
8. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for the stored search.

Search instructions	Enter the field and field values determined in Step 2. **Note:** Use one command on each line. Field names must be entered exactly as they appear in the Staff Field List.

9. Click **Submit**. The Stored Staff Searches page displays the new stored search.

How to Search for Staff Using Stored Searches

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Stored Searches**. The Stored Staff Searches page appears.
3. Click the **Search** icon next to the name of the stored search. The Group Staff Functions page appears and asks what to do with your selection. For more information, see *Work with Staff Groups*.

How to Edit Stored Staff Search Criteria

If you find that a search is not finding the correct staff members, there could be a problem with the search commands. On the other hand, perhaps the criteria for a specific group have changed. In either case, you must edit the search criteria.

Note: All PowerSchool users on your system will be impacted by your change. Contact other users before editing the criteria of a stored search.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.
5. Enter a field operator and value after the field in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click **Stored Searches**. The Stored Staff Searches page appears.
7. Click the name of the stored search you want to edit. The Edit Stored Staff Search page appears.
8. Edit the information as needed. For field descriptions, see *How to Create a Stored Staff Search*.

9. Click **Submit**. The Stored Staff Searches page displays the edited stored search.

How to Delete a Stored Staff Search

Remove a stored staff search that is no longer used.

Note: All PowerSchool users on your system will be impacted by your change. Contact other users before editing the criteria of a stored search.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Stored Searches**. The Stored Staff Searches page appears.
3. Click the name of the stored search you want to delete. The Edit Stored Staff Search page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Staff Directory

The staff directory displays the staff for the selected school and term. Use the staff directory to filter groups of staff members according to their functions or to find staff members' email addresses.

How to View the Staff Directory

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Staff Directory**. The Staff Directory page appears.
3. Click the individual's email address to send an email message to that staff member. Alternatively, select the email addresses in the Group Email field. Using your email application, copy and paste the selected addresses into the address field of a new email message.

How to Filter Staff Groups

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Staff Directory**. The Staff Directory page appears.
3. Click a staff group next to Listing Options. The selected staff group appears.
4. Click the individual's email address to send an email message to that staff member. Alternatively, select the email addresses in the Group Email field. Using your email

application, copy and paste the selected addresses into the address field of a new email message.

Staff Security Settings

PowerSchool administrators use this page to modify security settings for selected staff members. For more information, see *Security Permissions*.

New Staff Members

In PowerSchool, system users are considered staff members. All PowerSchool system users must be added as staff members before you can assign security permissions. When adding new staff members, you can assign permissions, as needed. Additionally, you can assign permissions by user group or set permissions at the page level. For more information about assigning permissions by user group, see *Group Security Permissions*.

How to Add a New Staff Member

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **New Staff Entry**. The New Staff Member page appears.
3. Use the following table to enter information in the fields:

Field	Description
Name	Enter the user's last, first, and middle name.
Preferred Name	Enter the staff member's preferred name, such as a nickname.
Email Address	Enter the user's email address.
Title	Enter the user's user role or professional title.
Gender	Choose **Male** or **Female** from the pop-up menu.
Ethnicity	Choose the user's ethnicity from the pop-up menu.
ID	Enter the user's identification number. This is a required field.

Homeroom	Enter the user's homeroom number.
School	The selected school appears.
Lunch ID	The user's PowerLunch identification number appears.
Home Phone #	The user's home telephone number appears.
School Phone #	The user's school telephone number appears.
Street	The user's address appears.
City, State, Zip	The user's city, state abbreviation, and postal code appear.
SSN	The user's Social Security number appears.
DOB	The user's birth date appears.
Staff Type	Choose the user's status from the pop-up menu. It is recommended that a status is assigned to each staff member. This makes searching for and selecting staff members more efficient.

4. Click **Submit**. PowerSchool searches across all schools in the district for duplicate staff records based on matches found in the following fields:
    - Last Name
    - Teacher Number
    - Email Address
    - Lunch ID
    - Home Phone #
    - Lunch ID
    - SSN
    - Address (Street + City + State, or just Street + City if not State is entered)
5. If there are no duplicate records matching that of the new staff record you are trying to create, the new record is created. Assign permissions to the new user. For more information, see *How to Edit Security Permissions*.

6. If there are similar records to the one you are attempting to create, the Match Existing Teachers page allows you to check for duplicate records from a list:
    - If the teacher's name appears on the page, click the name to add the teacher record to the current school.

      Note: If the teacher is found at the current school but marked inactive, the record will be made active.

    - If the teacher's name is not found on the page, click **Create New**. Assign permissions to the new user. For more information, see *How to Edit Security Permissions*.

Teachers and Affiliations

Edit the permissions of staff members on the Teachers and Affiliations tab.

Note: Field level security may be used to restrict this information. For more information, see *Field Level Security*.

How to Edit a Staff Member Security Settings

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. Use the following table to enter information in the fields:

Field	Description
Sign in to PowerTeacher	Select the checkbox if you want this staff member to be able to sign in to PowerTeacher Portal and PowerTeacher Gradebook.
Teacher Username	If you want this staff member to be able to access PowerTeacher, enter a username. If you do not, leave this field blank. **Note:** This field appears as read-only if Unified Classroom is enabled. For more information, see *Unified Classroom Setup*. **Note:** Use the **LDAP Enabled** checkbox next to the **Teacher Username** field to enable or disable LDAP Authentication for an individual staff member. For more information, see *LDAP*.

	Note: The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Teacher Username** (USERS.TEACHERLOGINID) and **LDAP Enabled** (USERS.TEACHERLDAPENABLED). For more information, see *Field Level Security*.
Teacher Password	If you entered a username in the **Teacher Username** field, enter the staff member's PowerTeacher password.
School Affiliations	Manage the schools you want this user to be affiliated with as a teacher/staff member. Selecting more than one school activates the **School** link on the navigation toolbar in the PowerTeacher Portal, and in PowerTeacher Gradebook (if applicable). For more information, see *School Affiliations*.

5. Click **Submit**. The Changes Recorded page appears.

School Affiliations

You can add different school affiliations to the teacher/staff user account. For every school added to this list, a record will be created at that school for the user. The user will be a staff member at that school and will display in search results and can be assigned sections. In PowerTeacher, users can switch to any active school in this list.

Any staff accessing the administrative portion of PowerSchool must also have at least one school affiliation record. If the staff member is not affiliated with any school, then select **District Office** on the **Add Schools** pop-up.

Identify which school is the “home” school for the account. The designated home school is the default context the staff member sees when signed in to PowerSchool.

How to Add School Affiliations

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the Teachers and School Staff section, click **Add** on the School Affiliations row. The Add Schools pop-up appears.
5. Select the checkbox next to each school you want to add.

Note: You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection.

6. Select the **Staff Type** from the pop-up menu.
7. It is recommended that you assign a status to each staff member. This makes searching for and selecting staff members more efficient and can affect what directory the user is in for LDAP systems. To specify the staff member's status, choose one of the following from the pop-up menu:
   - **Not Assigned**
   - **Teacher**
   - **Staff**
   - **Lunch Staff**
   - **Substitute**
8. Click **OK**. The selected School and Staff Type appear on the Security Settings page. The Active checkbox is automatically selected.
9. Click **Submit**. The school associations appear on the Security Settings page.

How to Modify School Affiliations

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the School Affiliations section, deselect the **Active** checkbox next to the school for which you want to remove access.

   Note: Once you click **Submit**, the school still appears on the Security Settings page, but the access is no longer active.

5. Click on the **Staff Status** field for a specific school to change the status, if needed. Select the status from the pop-up menu.

   Note: The user’s **Staff Status** at their home school is reported to LDAP servers regardless of their status at other schools.

6. Click the **Notes** icon in the Action column. The Notes pop-up appears. Enter any pertinent information about this school association for this staff account.
7. Click **Submit** to save changes.

How to Change the Home School

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the School Affiliations section, select **Home School** next to the school you want to designate as the home school for the staff account.
5. Click **Submit** to save changes.

   Note: PowerTeacher always signs a user in to their Home school before any other school. As a result, deselecting **Active** for a Home school will effectively disable access to all of the schools for that user account, since they will not be able to access the system to switch to any other school.

Admin Access and Roles

Assign access to the Administrative portion of PowerSchool and manage roles on the Admin Access and Roles tab.

How to Assign Admin Access

Use this procedure to assign access the administrative portion of PowerSchool.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Use the following table to enter information in the fields:

Field	Description
Sign in to Administrative Portion of PowerSchool	If you want this staff member to be able to sign in to PowerSchool, select the checkbox. Otherwise, leave the checkbox deselected.
Admin Username	If you want this staff member to be able to access the entire PowerSchool system, enter a username. If you do not, leave this field blank.

	Note: Usually, only school administrators, PowerSchool administrators, cafeteria personnel, guidance staff, and administrative staff members have access to PowerSchool. Teachers generally only have access to PowerTeacher Portal. **Note:** If LDAP is configured on your server, select the **LDAP Enabled** checkbox to enable or disable LDAP Authentication for an individual staff member. For more information, see *LDAP*. **Note:** Field level security may be used to restrict this information. The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Admin Username** (USERS.LOGINID) and **LDAP Enabled** (USERS.ADMINLDAPENABLED). For more information, see *Field Level Security*.
Admin Password	If you entered a username in the **Admin Username** field, enter the staff member's PowerSchool password.
Default Group	To assign the staff member to a security group, choose the appropriate group from the pop-up menu. This security group will be used throughout the administrative portion of PowerSchool unless overridden for a specific school by assigning a specific role. For more information, see *Role Assignments*. **Note:** Click the field name to view each group and its permissions in PowerSchool. For more information, see *How to Edit Security Groups*.
Allow Admin Sign in During These Times	Do one of the following: • Select **Any time** for no restrictions on when the staff member can sign in to PowerSchool. • Select **Allow this user's access from** and use the pop-up menus to choose the time range that the user is allowed to sign in to PowerSchool.
Allowed IPs	If you want this staff member to be able to use PowerSchool from certain computers only, enter the IP addresses of those computers in this field. This setting only affects the administrative portion of PowerSchool.

	Note: If you define more than one IP address, separate each address with a comma. If you want this staff member to be able to access PowerSchool from any computer, leave this field blank.
Roles and Schools	Manage role assignments for the user. For more information, see *Role Assignments*.

Role Assignments

Assigning a role provides you with the flexibility to set different security group access at different schools, or to create a user account for only external systems, such as features added through the Plugin Management Dashboard. Assigning a role is not required if you do not want the user account to have different group security at different schools.

You can assign a different level of the administrative portion of PowerSchool user access for each school affiliation by assigning different roles. Roles are assigned on the Security Settings page. For more information on setting up roles, see *Roles Administration*.

Important Note: At least one role must be associated with a Security Group in order to allow a user to switch to that school. When multiple Roles/Security Groups are added to a school, the users effective security permissions will be the highest level granted for all groups tied to a school. For example, if Group 1 allows access to Historical Grades, and Group 2 allows access to Demographics, then the user will have access to Historical Grades and Demographics. Furthermore, if Group 1 allows View Only access to Historical Grades, and Group 2 allows Modify Access to Historical Grades, then the user will receive Modify Access to Historical Grades. In addition, if a security group is removed from a role that has been assigned to a user, the user's Default Group will become their effective security group (if it was their only role for a particular school). This allows the user uninterrupted access to the school until a role can be added that does have a specific security group.

How to View Assigned Roles

Use this procedure to view roles assigned to a user account.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab. The following information appears:

Field	Description
Add	Click to assign a role. For more information, see *How to Assign a Role*.
School	School(s) the staff member can switch to in the administrative portion of PowerSchool. **Note:** The user's home school appears with **(Home School)** next to it.
Roles ([Group Name])	Roles and the security group associated to the role that have been assigned to the staff member.
[Information Icon]	1. Click to view information about group security permissions. The Effective Security Attributes pop-up displays Effective Security Group Option and Value information. For field descriptions, see *How to Edit Security Groups*. 2. Scroll to the Overridden Page Permissions section and click the arrow to expand the section. Page and Access Level information appear. For field descriptions, see *How to Set Page-Level Permissions*. 3. Scroll to the Field Level Security section and click the arrow to expand the section. Fields and Access Level information appear. For field descriptions, see *How to Modify Field Level Security*. **Note:** This section does not appear if field level security has not been applied. 4. Scroll to the Data Export Manager section and click the arrow to expand the section. Data Export Manager information appears, including the default level followed by the data sources users assigned to this role can edit and/or export. 5. When done viewing, click **OK** to close the pop-up.

[Edit Icon]	Click to edit a role assignment. For more information, see *How to Edit a Role Assignment*.
[Delete Icon]	Click to delete a role assignment. For more information, see *How to Delete a Role Assignment*.

How to Assign a Role

Use this procedure to assign a role to a user account that will access the administrative portion of PowerSchool.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Under Roles and Schools, click **Add**. The Add User Access Roles pop-up appears.
5. Use the following table to enter information in the fields:

Field	Description
Step 1: Schools	1. Select the checkbox next to each school you want to add to the list of schools this staff member can switch to in the administrative portion of PowerSchool. **Note:** To assign the user account with roles used for external systems, select **External Systems**, and select any roles that apply. Roles assigned to External Systems do not grant access to any PowerSchool school or district regardless of the PowerSchool Security Group. **Note:** You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection. 2. Click **Next**.
Step 2: Roles	1. Select one of the following options:

	• **Use Default Assignment and Roles Without Security Groups**: This allows assignment of roles that identify the user to an external application while preserving the user's default security group access in PowerSchool. • **Use All Roles**: This allows assignment of roles with an associated PowerSchool security group and roles without an associated security group. • **Use Roles Without Security Groups**: This allows assignment only of roles without an associated PowerSchool security group. **Note:** If no role is selected, the user's Default Group designates the access for the administrative portion of PowerSchool for that school. If a role is selected, the Security Group associated to the role overrides the Default Group for the user account while signed in to that school. 2. Select the checkbox next to each role you want to assign to this staff member. **Note:** The security group associated to the role appears in parenthesis. **Note:** You can also press SHIFT while selecting multiple roles, which automatically selects all roles between your first and last selection. 3. Click **OK**.

Note: Once all roles have been assigned, the **Add** button appears shaded.

6. Click **Submit**. A confirmation message appears and the role assignments display on the page.

How to Edit a Role Assignment

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.

3. Click the **Admin Access and Roles** tab.
4. Under Roles and Schools, click the **Edit** icon for the school, which you want to edit role assignments. The Edit User Access Roles pop-up appears.
5. Select one of the following options:
    - **Use Default Assignment and Roles Without Security Groups**: This allows assignment/removal of roles that identify the user to an external application while preserving the user's default security group access in PowerSchool.
    - **Use All Roles**: This allows assignment/removal of roles with an associated PowerSchool security group and roles without an associated security group.
    - **Use Roles Without Security Groups**: This allows assignment/removal only of roles without an associated PowerSchool security group.

    Note: If no role is selected, the user's Default Group designates the access for the administrative portion of PowerSchool for that school. If a role is selected, the Security Group associated to the role overrides the Default Group for the user account while signed in to that school.

6. Do one of the following:
    - Select the checkbox next to each role you want to assign to this staff member.
    - Deselect any roles that you want to remove from this school assignment.

        Note: The security group associated to the role appears in parenthesis.

        Note: You can also press SHIFT while selecting multiple roles, which automatically selects all roles between your first and last selection.

7. Click **OK**.
8. Click **Submit**. The updated role assignment appears.

How to Delete a Role Assignment

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Under Roles and Schools, click the **Delete** icon of the school for which you want to remove all access. The school appears shaded.
5. Click **Submit**. The updated school list appears.

Set Page-Level Permissions

To define each user group's access to individual pages within PowerSchool, use the page permissions function. For detailed information, see *Page-Level Permissions*.

Applications

Assign access to different PowerSchool applications on the Applications tab.

How to Assign Application Access

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Applications** tab.
4. Use the following table to confirm and enter information in the fields:

Field	Description
PowerTeacher Administrator	Select the checkbox if you want this staff member to be able to sign in to PowerTeacher Administrator.
ReportWorks Developer	Select the checkbox if you want this staff member to be able to sign in to ReportWorks. To launch ReportWorks, see *How to Launch ReportWorks Developer*.
Oracle Application Express Account (APEX)	Select the checkbox if you want this staff member to be able to sign in to the APEX Builder application. **Note:** To reset the password, deselect the checkbox, submit, and then re-select the checkbox. **Note:** If this account has been locked in APEX, deselect the checkbox, submit, and then re-select the checkbox.

2. Use the following table to enter information in the APEX Settings section:

Field	Description

PowerSchool Username	The staff member's PowerSchool username.
First Name	The staff member's first name.
Last Name	The staff member's last name.
Email	The staff member's email address.
Password	Enter the staff member's password.
Confirm Password	Enter the staff member's password again.

3. Click **Submit**. A confirmation message appears.

Work with Staff Members

PowerSchool provides you with the ability to work with staff member user accounts, including editing the account information, add a photo, setting the staff schedule, view fee transactions, and more.

Staff Page Layout

Each view or menu item on the Staff page looks different, but the top of each displays the name of the page and staff member. Look at the staff pages menu on the left side of the screen. All of the items listed are either possible actions performed or items viewed on a staff member's record. This is where you will start the activities described in this section.

Use the following buttons and links to help you find the staff records you need:

- **Staff Search**: Displays a search field to look for other staff records.
- **List**: Displays the current selection of staff members on the Select a Staff Member page.
- **Previous Record** arrow: Displays the record preceding the selected record.
- **Next Record** arrow: Displays the record following the selected record.
- Remaining links indicate possible actions to be performed on the selected record.

Staff Information

After selecting a staff member, you can edit information about that person. When a staff member no longer works at your school, indicate an inactive status for that person. For more information about adding staff members, see *How to Add a New User*.

How to Edit Staff Information

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Information** from the staff pages menu. The Information page appears.
3. Use the following table to edit information in the fields:

Field	Description
Name	Enter the staff member's last, first, and middle name.

Preferred Name	Enter the staff member's preferred name, such as a nickname.
Email Address	Enter the staff member's email address.
Title	Enter the staff member's role or professional title.
Gender	Indicate the staff member's gender by choosing either **Male** or **Female** from the pop-up menu.
Ethnicity	Specify whether or not the staff member is Hispanic or Latino by selecting the appropriate option. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Race	Specify the staff member's race by selecting the appropriate checkboxes. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*. **Note:** Field level security may be used to restrict this information (TEACHERRACE.RACECD and USERS.FEDRACEDECLINE). For more information, see *Field Level Security*.
Reporting Ethnicity	Specify the staff member's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.
ID	Enter the staff member's identification number (required).
Homeroom	Enter the staff member's homeroom number.

Home School	Displays the designated home school for the teacher. For more information, see *How to Edit Staff Member Security Settings*.
Lunch ID	Enter the staff member's PowerLunch identification number. For more information, see *How to Create Lunch ID Numbers for Staff*.
Home Phone #	Enter the staff member's home telephone number.
School Phone #	Enter the staff member's school telephone number.
Street	Enter the staff member's street name.
City, State, Zip	Enter the staff member's city, two-letter state abbreviation, and postal code.
SSN	Enter the staff member's Social Security Number.
DOB	Enter the staff member's birth date.
Staff Type	It is recommended that a status is assigned to each staff member. This makes searching for and selecting staff members more efficient. To specify the staff member's status, choose one of the following from the pop-up menu: • **Not Assigned** • **Teacher** • **Staff** • **Lunch** • **Substitute** **Note:** For a user to appear in PowerSchool's teacher's pop-up menus, **Teacher** must be selected.
Status	Specify the staff member's status by choosing **Current** or **No longer here** from the pop-up menu. If you choose **No longer here**, the staff member's PowerSchool account is inactive, and he or she cannot access PowerSchool.

4. Click **Submit**. The Edit Information page appears.

Consolidate User Accounts

You can merge multiple user accounts into one account. If you have staff members who teach at multiple schools, PowerSchool used to require a different user account for each school. Now, you can consolidate the multiple accounts to one account and assign different schools and user rolls to a single account.

How to Consolidate Users

Be sure to verify which staff member record will serve as the master record before searching for staff members and consolidating users. The consolidation process is non-reversible.

Note: This procedure may only be performed at the district level.

1. On the start page, search for and select all of the records for a staff member. Only a single record for each school may be selected. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Consolidate Users**. The Consolidate Users page appears. Verify that all of the accounts that appear belong to the same user.

   Note: If incorrect accounts appear on the page, refine the search selection, and repeat Steps 2 and 3.

4. Click the **Master** option to select the staff member account that will serve as the master user account.
5. Click **Submit**.
6. Click **Confirm Submit**. A confirmation message appears, and the staff user accounts are merged into the selected user account.
7. On the start page, search for the staff member user account you just consolidated.
8. Click **Security Settings** on the main menu. The Security Settings page appears.
9. Verify the information on the page. For more information, see *How to Edit Staff Member Security Settings*.
10. Click the **Role Assignment** tab. Verify the User Access Roles assigned to each school. For more information, see *Role Assignments*.

Staff Current Schedule

View the schedule for a specific teacher. You can view a teacher's current schedule from either the Staff page or the main menu. To view teacher schedules from the main menu, see *Teacher Schedules*.

When viewing a teacher's schedule from the Staff page, you can view the schedule in either a table or a matrix format.

You can also view PowerTeacher Pro for the selected teacher in read-only mode.

How to View PowerTeacher Pro in Read-Only Mode via Teacher Schedules

1. On the start page, select **Teacher Schedules** form the main menu.
2. Select a teacher. The teacher's current schedule appears.
3. Click the **PowerTeacher Pro** button to launch a read-only version of the application.

How to View PowerTeacher Pro in Read-Only Mode via Current Schedule

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Select **PowerTeacher Pro** from the staff pages menu to launch a read-only version of the application.

How to View Teacher Schedules From the Staff Page

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Current Schedule** from the staff pages menu. The selected teacher's schedule appears.
3. On the Teacher Schedule page, you can do the following:

Field	Description
Display today’s sections	Select the checkbox to display only those sections for which the teacher has an active role for the current day. Deselect the checkbox to view all sections for which the teacher has an active role for the selected term.
New	Click to add a section to the teacher's schedule. The Create New Section page appears. For more information, see *How to Add Sections to Teacher Schedules*.

Term	Click to view term information for this section. The Term page appears.
Course	Click the name of the course to view basic course information. The Course Information page appears.
Section #	Click to view information about this section. The Edit Section page appears. For more information, see *Sections*.
Enrollment	Click to display the section's class roster. The Class Roster page appears. For more information, see *How to View the Class Roster*.
Attendance	Click the **chair icon** to record meeting attendance for a specific date. This icon only appears if attendance can be entered for the date or term. For more information, see *Record Meeting Attendance by Section for a Specific Date*. Click the **grid icon** to record meeting attendance for a specific date range. This icon only appears if attendance can be entered for the date or term. For more information, see *Record Meeting Attendance by Section for a Date Range*.
Analytics	Click to view Analytics data. For more information, see *View Analytics Data*. **Note:** The Analytics icon only appears if Analytics is enabled. For more information, see *Enable Analytics*. **Note:** The data that appears on the graph is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.
Lock	An icon appears to display the reporting term lock status for this section. The legend at the bottom of the page indicates the different status icons. If some of the reporting terms for the section are locked, you can click the blue information icon to view the status of the different reporting terms associated to the section.

	If the section is associated with PowerTeacher Gradebook, N/A-PTG appears in the field. If the section is manually locked or unlocked, you can hover over the icon to view the expiration date for the setting.
Make all student listed above the current selection	Click to work with the group of students in all of the selected teacher's classes listed in the schedule. The Group Functions page appears. For more information, see *Work with Groups*.
Unlock Selected Sections	Use the selection menu to choose whether to lock, unlock, or clear manual locks from selected sections. For more information, see *How to Manually Lock and Unlock Sections*.

How to View the Teacher Schedule Matrix

The schedule matrix graphically represents a teacher's schedule for all days, periods, and terms in the currently selected year.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Schedule Matrix** from the staff pages menu.
3. To narrow the information that appears on the schedule matrix, use the following table to enter information in the Filter section:

   Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	Description
Co-Teacher Sections	Choose one of the following: • **Show** to include any co-teacher sections in the schedule matrix. • **Hide** to exclude any co-teacher sections in the schedule matrix. **Note: Show** is the default setting.

Only Display Current Sections	Choose one of the following: • **Yes** to display only those sections for which the teacher has an active role for the current day. • **No** to view all sections for which the teacher has an active role for the selected term.

The Schedule section refreshes and displays the teacher's schedule for each period and day in each term. Identical colors on the schedule indicate the same section. A blank block means that nothing is scheduled for that block in that term. Each block includes the following information:

- Course name
- Course number
- Section number
- Room number
- Schedule expression, which is the combination of periods and days
- Term taught
- Current/maximum enrollment

How to Add Sections to Teacher Schedules

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. Click **New**. The Create New Section page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Course Number	Enter the course number.
Expression	Select the checkboxes for the combination of days and periods in which this section meets. For example, select the checkbox for **Period 1** and **Day A** if a section of Chemistry meets during first period on A days.

Teacher	The selected teacher appears.
Room	Enter the room in which this course section meets.
Section Number	Enter the section number in this field. Do not enter special characters. **Note:** Section numbers must be unique among sections of the same course for a given school year.
Term	Choose the appropriate term from the pop-up menu.
Grade Level	If this course is available only for a certain grade level, enter the grade level. Otherwise, leave this field blank.
Grade Scale	Choose the grade scale from the pop-up menu. For more information, see *Grade Scales*.
Maximum Enrollment	Enter the maximum number of students who can enroll in this course section.
Where Taught	If this course section is taught outside your school, enter the school's ID in this field. If it is taught at your school, leave this field blank.
Dependent Sections	If this course section has dependent sections, enter them in this field using the course.section, course.section format. If a student is enrolled in a class, it is not teacher-specific, but rather section-specific. Often used by elementary schools where students take a set of classes, dependent sections indicate that if a student is registered in one class, he or she must also register for the dependent class. If the dependent section conflicts with another class, you can manually drop the student from the class and add him or her to another section. This function has no implications with prerequisites or graduation requirements.

Record Attendance Using Attendance Mode	Use the pop-up menu to indicate the method by which you want attendance recorded. At this time, Meeting attendance is your only option.
Record Attendance	If the section meets more than one period in a day, you can choose to take attendance once or for every period by selecting the **Once for All Meetings** option or the **Each Meeting Separately** option.
Exclude From Attendance	Select the checkbox if you do not want attendance and enrollment in this section to be counted towards any ADA/ADM calculations.

5. Click **Submit**. The Teacher Schedule page displays the new section.

Staff Photos

This page displays a photo of the staff member. If no photo is available, you can submit a photo for the staff member. The selected photo appears next to the selected staff member's name at the top of each staff page. Click the photo to view a larger version of the photo.

How to Submit a Staff Photo

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Photo** from the staff pages menu. The Teacher Photo page appears. If a photo is available, it appears in the center of the page.
3. Click **Submit a New Photo for [staff member]** to change or add a photo for a staff member. The Submit Photo page appears.
4. Click **Choose File**. The Open dialog appears.
5. Locate and double-click the file. The Submit Photo page appears.

   Note: The photo must be in JPEG format.

6. Click **Submit**. The Teacher Photo page displays the staff member's photo.

How to Delete a Staff Photo

Use this procedure to delete student photo.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Photo** from the staff pages menu. The Teacher Photo page appears.
3. Click **Delete**.
4. Click **Confirm Delete Photo**. The Teacher Photo page no longer displays the teacher's photo.

Staff Schedule Setup

Use this page to edit scheduling information for the selected staff member.

How to Edit Staff Schedule Setup

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Schedule Setup** from the staff pages menu. The Staff Scheduling Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Department	Click **Associate** to select this teacher's department.
Preferred Room	Click **Associate** to select this teacher's classroom. The system always attempts to schedule courses assigned to this teacher in his or her preferred classroom first.
Maximum Consecutive Periods	Choose from the pop-up menu the maximum number of periods this teacher can teach in a row (according to his or her contract).
Maximum Periods Free	Choose the maximum number of free periods this teacher can have in his or her schedule each day from the pop-up menu.
Schedule This Teacher	Select the checkbox if you want the system to schedule this teacher. **Note:** If you deselect the checkbox, the system will not include this teacher in the schedule build process.

Is Always Free?	Select the checkbox to allow this teacher to be scheduled for an unlimited number of courses during the same period. For example, some special education teachers teach different subjects to different students in the same room during the same period.
Building Code (optional)	Click **Associate** to select this teacher's building.
House Code (optional)	Click **Associate** to select this teacher's house.
Team Code (optional)	Choose from the pop-up menu the team to which you want this teacher to belong.
Maximum Student Load	Specify the maximum number of students that a teacher can have per day. For more information, see *Teacher Maximum Load*.

4. Click **Submit**. The Staff Scheduling Preferences page displays the changes.

Staff Transactions

Use this page to view or record any fee-related transactions for the selected staff member. Transactions such as meal purchases automatically appear on the Transactions page. Since PowerLunch records meal purchases, do not use the Transactions page to enter meal purchases.

How to View Staff Transactions

View any debit or credit transactions for the selected staff member. The Transactions page displays the staff member's name, ID, and current balance.

1. On the start page, search for and select a staff member. For more information, see Staff Search.
2. On the Staff page, click **Transactions** from the staff pages menu. The Transactions page displays any financial transactions for the selected staff member:

How to Record Staff Transactions

Use this page to enter transactions such as campus bookstore purchases and payments to staff member accounts. Since PowerLunch records meal purchases, do not use the Transactions page to enter meal purchases.

Transactions cannot be deleted. However, you can reverse a transaction by adding an opposite transaction. For example, if you enter a credit transaction but meant to enter a debit transaction, enter two debit transactions of the same amount. Enter in the Description field text such as "Reverse accidental credit transaction" for one of the debit transactions.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Transactions** from the staff pages menu. The Transactions page displays any financial transactions for the selected staff member.
3. Click **New** to record a new transaction. The Transaction Record page appears.

   Note: Do not manually record transactions that are normally automated transactions, such as PowerLunch Quicksales. For more information, see *PowerLunch*.

4. Use the following table to enter information in the fields:

Field	Description
Date of Transaction	Enter the transaction date using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter a description for the transaction. Only the first 24 characters and spaces of the description appear on the Transactions page.
Debit	Enter an amount for the transaction to decrease the balance on the staff member's account. If you enter a debit, do not enter anything in the Credit field. Record credit transactions separately.
Credit	Enter an amount for the transaction to increase the balance on the staff member's account. If you enter a credit, do not enter anything in the Debit field. Record debit transactions separately.

5. Click **Submit**. The Transactions page displays the new transaction.

Analytics Teacher View

The Analytics Teacher View page displays Analytics teacher data. This menu link only appears if Analytics is enabled. For more information, see *Enable Analytics.*

Note: The data that appears on the page is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

How to View Analytics Teacher Data

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Analytics Teacher View** from the staff pages menu. The Analytics Teacher View page appears.

   Note: You can also access the Analytics Teacher View from the Teacher Schedule page. For more information, see *Staff Current Schedule*.

Staff Custom Screens

PowerSchool administrators design custom screens to display a variety of information about staff members. There is no limit to the number of custom screens that a school can set up to track any kind of information. Thus, the pages are school-specific and will differ from the examples. After selecting a staff member and clicking **Custom Screens**, a list of custom screens at your school appears.

For more information about creating custom screens, see *Custom Staff Fields and Screens*.

How to View Staff Custom Screens

1. On the start page, search for and select a staff member. For more information, see *Staff Search*. A list of custom screens appears.

   Note: Your PowerSchool administrator can modify this page or create new ones to meet your school's needs.

2. Click the links to the pages, if available. The custom screen appears.

Work with Staff Groups

Using the Group Staff Functions page, you can manage records for a selected group of staff members in a variety of ways.

Copy Database Extensions (Legacy Custom Field Data)

Use this page to copy the selected Staff Member(s) database extensions (legacy custom field data) from their designated Home School to the currently selected staff record.

How to Copy Database Extensions (Legacy Custom Field Data)

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Copy Legacy Custom Field Data**. The Copy Legacy Custom Field Data page appears.
4. Click **Submit**.
5. Click **Confirm Submit**. The legacy custom field data will now appear on all selected staff records.

Export Staff Using Template

Using a template, export staff data for the currently selected staff members.

How to Export Staff Using Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Export Using Template**. The Export Using Template page appears.
4. Choose the template from the Export template pop-up menu.
5. Click **Submit**. The exported staff information page appears.

List Staff Members

Use this page to generate a printable report of the currently selected staff members.

How to List Staff Members

1. On the start page, search for and select a group of staff members. For more information, see Staff Search.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **List Staff Members**. The List Staff Members page appears.
4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a report title.
Col.	Numerical representation of the number of items that will appear on the list.
Field Name	Enter the name of the field. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** To number the staff members on the printed list, enter ***count** in the Column 1 **Field Name** field.
Column Title	Enter the column title. This may or may not be the same as the field name. For example, to display birthdays on the printed list, title the column as **Birthday** even though the field name is **DOB**.
Padding in Each Cell	Enter the amount of space between the cell and the text in points. **Note:** One point equals 1/72 of an inch.

# Rows in Between Breaks	This refers to the number of staff names to print before each break in the list. After each break, column titles are printed again. Enter **0** if you do not want breaks inserted.
Other Options	Select the **Gridlines** checkbox to draw lines between rows and columns and to put a border around the list. Select the **Export** checkbox to create the list in another application. If you deselect the checkbox, the list appears in your Web browser only.
Optional: Sort Field Name	Enter up to three field names to sort items in the selected columns or fields. For each field, choose indicate the sort order by choosing ascending (**>**) or descending (**<**) from the **Directions** pop-up menu. If you select to sort more than one column/field, PowerSchool sorts them in the order listed. **Note:** If you have never sorted a list before, it is a good idea to try different options here to view how list items are ordered each time.

5. Click **Submit**. The page displays the list. If it is formatted correctly, continue to the next step. If not, click **Back**, make the necessary changes, and click **Submit** again to preview the revised list.
6. Click your Web browser's Print button to print the report.

   Note: To fit more staff members on the page, change the paper layout or use the reduction setting on your Web browser. Choose **File** > **Print**. Make the appropriate selections in the Print dialog.

Print Staff Mailing Labels

Prints mailing labels for the currently selected staff members. Set up the mailing label layouts for staff from the same area as the student mailing labels. For more information, see *Mailing Labels*.

How to Print Staff Mailing Labels

1. On the start page, search for and select a group of staff members. For more information, see [Staff Search](#).

2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Print Mailing Labels**. The Print Mailing Labels page appears.
4. Use the following table to enter information in the fields:

Field	Description
Print Mailing Labels For	Select an option to indicate the staff members for whom the report will be run, if necessary.
Use this mailing label layout	Choose a mailing label layout from the pop-up menu. Click **mailing label layout** to view, add, or edit a mailing label layout. For more information about mailing label layouts, see *How to Add a Mailing Label Layout*.
How Many Pages?	Select an option to indicate the number of pages to print.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.

5. Click **Submit**. The report appears with the specified parameters. Review it from beginning to end to verify that the formatting and content are correct.

   Note: If you are ready to print the labels, see *Run, Print, and Save Reports*.

Print a Staff Report

Use this page to print reports for the currently selected staff members. Set up the report layouts from the same area as the student reports. For more information, see *Form Letters*.

How to Print a Staff Report

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.

2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Print a Report**. The Print A Report page appears.
4. Use the following table to enter information in the fields:

Field	Description
Which report would you like to print?	Choose the form letter from the pop-up menu.
For which staff members?	Select an option to indicate the staff members for whom the report will be run, if necessary.
Print only the first X pages	If you only want to print a limited number of pages, select the checkbox and enter the number of pages.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the **Which report to would you like to print** field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the **Date Range**, enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose a standard phrase or select Custom and enter the text you want to print as a watermark in the field.
Watermark Mode	Choose how you want the text to print from the pop-up menu. Watermark prints the text behind objects on the report, while Overlay prints the text over objects on the report.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. **Note:** When generating object reports, certain report text may appear in the default English language. For more information, see *Object Reports*.

5. Click **Submit**. The report appears with the specified parameters. Review it from beginning to end to verify that the formatting and content are correct.

   Note: If you are ready to print the report, see *Run, Print, and Save Reports*.

Quick Export Staff

Use this page to quickly export staff data for the currently selected staff members.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Export**.

How to Quick Export Staff

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Quick Export**. The Quick Export page appears.
4. Use the following table to enter information in the fields:

Field	Description
[Export Staff]	Enter the fields to be included on the exported spreadsheet. Enter as many fields as you want. Separate multiple fields with spaces. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears.
Field Delimiter	Choose a field delimiter from the pop-up menu. The field delimiter is the item that separates fields in the exported data. If you select **Other**, enter the delimiter in the blank field.
Record Delimiter	Choose the record delimiter from the pop-up menu. This refers to the item that will separate the records in the exported data:

	• **CR**: carriage return • **CRLF**: carriage return line feed • **LF**: line feed If you select **Other**, enter the delimiter in the field.
Surround Fields	Select the checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select the checkbox to include column titles on the first row of the exported data.

5. Click **Submit**. Either save the file to a specified location or open the file to display the report in a spreadsheet application.

Set Staff Field Value

Use this page to change the value of the selected field for all of the currently selected staff members.

Note: For detailed information about PowerTeacher gradebook administration and setup, see the *Enable PowerTeacher for a Selection of Teachers* section in the *PowerTeacher Gradebook Administrator Installation and Setup Guide* available on PowerSource.

How to Set Staff Field Value

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Set Staff Field Value**. The Teacher Field Value page appears.
4. Use the following table to enter information in the fields:

Field	Description
Field to Change	Enter the name of the field to be changed. To insert a PowerSchool field into this field:

	1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears.
New Field Value	Enter the new value of the field. Put quotation marks around any values that do not perform calculations, such as constant characters or a string of characters.
Clear Field Value	Select the checkbox if you want to remove any existing values for that field.
Do not overwrite existing data	Select the checkbox if you do not want the system to overwrite any existing field values.

5. Click **Submit**. When the operation is complete, click **Back**. Now you can perform a search to find the group with the changed value.

Perform Staff LDAP Directory Synchronization

Use the LDAP Directory Synchronization page to synchronize PowerSchool Usernames with an LDAP directory server.

Note: For more information about LDAP, see *LDAP*.

How to Perform Staff LDAP Directory Synchronization

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **LDAP Directory Synchronization**. The LDAP Directory Synchronization page appears.
4. Edit the User ID Attribute as needed.
5. Click **Submit**.

Select a Group of Teachers by Hand

For detailed information, see *Staff Search*.

Run the Data Validation Report for Teachers

For detailed information, see *Run the Data Validation Report*.

Run the Teacher Schedule Report

The Teacher Schedule Report allows you to produce and print teacher schedules for the current year with page breaks between teachers. Though this report can be viewed with Safari for Mac OS X and Microsoft Internet Explorer for Windows, other browsers may not appropriately display the report formatting.

Tips for printing this report:

- Enable the printing of backgrounds. Shading and colorations in reports are all considered backgrounds. Not printing backgrounds may lead to illegible printouts.
- Turn off the printing of header information in your browser settings. If this is not off, each page printed may include the URL of this page, a page number, and a time stamp. These are generally not desired for this report.
- Use your browser's Print Preview function to confirm that the output is correct prior to sending to the printer. You may adjust text size using the text font size controls of your browser. You may also control the page orientation using your browser settings to fix table cells that span page breaks or reports that print too small.

How to Run the Teacher Schedule Report

1. On the start page, search for and select a group of staff members. For more information, see Staff Search.
2. Click Functions. The Group Staff Functions page appears.
3. Click Teacher Schedule Report. The Teacher Schedule Matrix Report page appears.
4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a title for the report.
Teachers to scan	Select an option to indicate the teachers to include, if applicable.

Max Teachers per Page	Enter the maximum number of teachers to display per page.
Sort Order	Select an option to indicate the sort order.
Bell Schedule for Period Start/End Times	Select from the pop-up menu which bell schedule to use to display the start and end times for each period.
Include Co-teaching Sections	Select the checkbox to include all sections for which the teacher has an active role for the current term.
Display Only Today's Co-teaching	Sections Select the checkbox to display only those sections for which the teacher has an active role for the current day. Deselect the checkbox to view all sections for which the teacher has an active role for the current term.

5. Click **Submit**. The Teacher Schedule Report appears.

Students User Guide

PowerSchool
Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

Whether working with an individual student or a group of students, PowerSchool makes it is easy for administrators to manage students and their information.

Student Search

Learning how to perform searches is the key to using PowerSchool, since you select a student or group of students with whom you are going to work. Before you can do any type of work on a student's record or on a group's records, select the individual or group. By performing a search, you make such a selection. The simplest search finds just one student, but it is possible to perform searches that are more complex.

When performing both simple and advanced searches, it is important to keep in the mind the following:

- Any work with student records always begins with a search. You must tell PowerSchool which records to retrieve to work with an individual student record or a group of students.
- Enter field names in the Search field exactly as they are written in the field list. PowerSchool cannot find a field when its spelling does not match the fields in PowerSchool. Placement of underscores (_) is just as important. To verify the correct spelling of a field, click **View Field List** on the PowerSchool start page.
- While the spelling of the field name is important, the case is not. Enter **gender=f**, **Gender=F**, **GENDer=F**, or any variation thereof. PowerSchool searches are not case-sensitive.
- Separate different search criteria in the command line with a semicolon (**;**).

Searching for Student Records

PowerSchool provides powerful tools to search the database of students at your school. On the start page, use the box labeled "Search Students" to find students by surname. For example, enter MA to find all students whose last names begin with MA.

Field/Value Searching

PowerSchool stores student information in fields. For example, the "first_name" field stores the students' first names. The "DOB" filed stores the students' date-of-birth. Search the various student fields based on the information you are looking for.

The following is an example of how to search student records.

Suppose you would like to find all of the students in your school whose first name is Jenny. Type the following into the search box:

first_name=jenny

PowerSchool displays the search results for all students named Jenny. This is a search command line; a line of text that is commanding PowerSchool to perform a search.

Every search command line is broken into three parts: a field name (such as first_name or grade_level or DOB); a comparator (such as =); and the search argument itself (in the example, jenny is the search argument).

The general format is:

[field name] [comparator] [search argument]

On the start page, select the View Field List link below the Search Students box to view a list of available field names.

The following table lists the comparators you can use:

Comparator	Meaning
=	equals
<	is less than
>	is greater than
<=	is less than or equal to
>=	is greater than or equal to
#	does not equal
in	is [field] present in the search argument?
contains	is the search argument contained in the [field]?
!contain	is the search argument not contained in the [field]?
@	wildcard

The comparator "in" is a powerful tool that allows you to verify if the value of the field matches any search argument in a list you provide. For example, to obtain a single list of all 9th, 10th, and 11th graders in your school, enter the following search command line:

grade_level in 9,10,11

PowerSchool displays all students whose grade level is contained in the list 9, 10, and 11. In this example, the field is "grade_level", the comparator is "in", and the search argument is "9,10,11". The search function looks at the specified field for every student and checks to see if that field matches anything in the search argument specified. When entering a search command line, separate a list of items in a search argument with commas.

The comparator "contains" is another powerful search tool. For example, you want to find all of the students in your school who live on Cherry Lane. Enter the following search command line:

mailing_street contains Cherry Lane

PowerSchool displays all students with Cherry Lane appearing in the mailing_street field. It does not matter if the mailing_street field is 194 Cherry Lane, or 24230 Cherry Lane Parkway; anything that contains Cherry Lane is considered a match.

The comparator "!contain" provides another search function. For example, you wanted to find all of the students in your school who do not live on Cherry Lane. Enter the following search command line:

mailing_street !contain Cherry Lane

PowerSchool displays all students with Cherry Lane not appearing anywhere in the mailing_street field. It does not matter if the mailing_street field is 194 Cherry Lane, or 24230 Cherry Lane Parkway; anything that contains Cherry Lane is not considered a match.

The wildcard "@" provides additional search flexibility. For example, you want to find all of the students whose first names started with jen. Enter the following search command line:

first_name = jen@

PowerSchool displays all students with the first name that begins with jen.

Special Groups

In addition to simple field/value searching, you may search for special groups, such as "transferred-in". With a single command in the search field, you can select a set of students using criteria which would be impossible to reproduce using simple field/value searching, and which would take a significant amount of effort to produce using the "search in results" functionality.

Search	Who is Selected
transferred-in	All students who have been transferred into this school, but not yet re-enrolled. In database terms, this means that the "SchoolID" is for the current school, but the "Enrollment_SchoolID" is for

	some other school, AND that the "Enroll_Status" field is "2" ("Transferred Out"). The "/" prefix is implied on this search. This is the equivalent of searching "/Enroll_Status=2", "&/Enrollment_SchoolID#[my school number]".

Search Prefixes

There are three search prefixes you may wish to use. A search prefix adjusts how the search is carried out. Note that you will always follow the prefix by a search term; a prefix is never valid all by itself on the search line.

Prefix	Effect on Search Line
/	Include non-active students. Normal searches are restricted to the actively enrolled student body of the school. However, especially when transferring students in from another school, you may sometimes wish to locate students who are no longer or not yet active. Use this prefix to search across ALL students (such as, active and inactive). Note that this may be placed AFTER (not before) a "+" or "&" prefix.
&	Search within results. For example, to find all students transferred in after 4/10/2006, search first for "transferred-in", then search for "&/ExitDate>4/10/2006". Note that the "&" must come BEFORE any "/" prefix. **Note:** When the **Advanced** checkbox is selected, this comparator does not function. You can use the **Within** button in its place. For more information, see *Search Results/Current Student Selection*.
+	Add results of new search. For example, to find all tenth graders and all ninth graders with the field "InstrLevel" set to "Advanced" you might search for "Grade_Level=9" and then "&InstrLevel=Advanced", and finally for "+Grade_Level=10". Note that the "+" must come BEFORE any "/" prefix. **Note:** When the **Advanced** checkbox is selected, this comparator does not function. You can use the **Add** button in its place. For more information, see *Search Results/Current Student Selection*.

Search Students Page

When first signing in, the main part of the start page displays the Search Students function. Additionally, you can click the **PowerSchool** logo from any page in PowerSchool to access the Search Students function.

Search Students

The following information can be used to search for students:

Field	Description
[Search Students]	Enter search criteria in the search field. If Smart Search is enabled, as you begin entering your search criteria, PowerSchool automatically provides a drop-down list of suggestions that you may choose from. For more information, see *Smart Search*.
[Search Icon]	Click to initiate the search.
Advanced	Do one of the following: • Leave the checkbox blank to select a student or group of students as your current student selection. • Select the checkbox to search for and then select a student or group of students as your current student selection. **Note:** By default, the checkbox is not selected.
Include Remote Enrollments	Do one of the following: • Leave the checkbox blank to search for students who are enrolled at the selected school. • Select the checkbox to search for students who are enrolled/remotely enrolled at the selected school. **Note:** If a student is remote enrolled, they are enrolled in one or more classes at a selected school, while maintaining their enrollment at their home school.

	Note: If the checkbox is selected the, Home school of all students returned is included in the display. **Note:** By default, the checkbox is not selected.
View Field List	Click to view the PowerSchool Field List pop-up, which displays a list of all fields that can be used to perform a student search. For more information, *How to Search for Students by Other Fields*. **Note:** Database extension fields can be selected from the pop-up, but any associated one-to-many tables are not searchable at this time. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.

Browse Students

The following information can be used to browse for students:

Field	Description
[Alphabet]	Click a letter of the alphabet to display a list of students whose last names begin with the selected letter. For example, if you click **B**, the system displays the students at your school whose last names begin with a "B". For more information, see, *How to Select an Individual Student by Last Name*.
[Grade]	Click a number to display a list of students in the selected grade. If you click **9**, the system displays a list of ninth graders at your school. For more information, see *How to Search for Students by Grade Level*.
[Gender]	Click **M** to display a list of all the male students at your school. Click **F** to display a list of all the female students at your school. For more information, see *How to Search for Students by Gender*.
All	Click to display a list of all active students at your school. For more information, see *How to Search for All Active Students*.

Stored Searches	Click to create or work with a saved list of preset search criteria used to quickly find groups of students. For more information, see *Stored Searches*.
Stored Selections	Click to create or work with a saved list of students. For more information, see *Stored Selections*.

Current Student Selection

When the **Advanced** checkbox is not selected, the following options are available:

Note: For more information, see *How to Set the Current Student Selection*

Field	Description
[Student]	The following information displays for each student matching your search criteria: • **Student** • **Student Number** • **Grade Level** • **Date of Birth** • **Social Security Number** Click a student's name to view the student pages for this student. **Note:** Information appears based on Select Student Options settings. For more information, see *Select Student Options Settings*.
Select By Hand	Click to select students by hand. **Note:** For more information, see *How to Select a Group of Students by Hand*.
[Select Function]	Click the arrow and choose a group function from the pop-up menu to begin working with your current student selection. The selected group function page appears. **Note:** By default, this button appears as **Select Function**. Once a function has been selected, the button appears as your selection

	for up to three days (if another function is not selected before then). **Note:** For more information, see *Select a Group of Students*.

Search Results/Current Student Selection

When the **Advanced** checkbox is selected, the following options are available:

Note: For more information, see *How to Set the Current Student Selection using the Advanced Setting*.

Note: When the **Advanced** checkbox is selected, the ampersand (&) and plus (+) comparators do not function. You can use the **Add** button in place of the plus (+) comparator and the **Within** button in place of the ampersand (&) comparator.

Search Results	
Field	**Description**
[Student]	Do one or more of the following: • Select the checkbox in the header row to select all students. • Deselect the checkbox in the header row to deselect all students. • Select the checkbox next to each student you want to work with. • Deselect the checkbox next to each student you do not want to work with.
Student	The student's last and first name.
Set	Click to make the selected students in the Search Results section the current selection. Selected students appear in the Current Student Selection section.

Add	Click to add the selected students in the Search Results section to the current selection. Selected students appear in the Current Student Selection section.
Subtract	Click to remove the selected students in the Search Results section from the current selection. Selected students no longer appear in the Current Student Selection section.
Within	Click to adjust the current selection to only the selected students in the Search Results section. Only the selected students appear in the Current Student Selection section.
Current Student Selection	
[Student]	The following information displays for each student matching your search criteria: • **Student** • **Student Number** • **Grade Level** • **Date of Birth** • **Social Security Number** Click a student's name to view the student pages for this student. **Note:** Information appears based on Select Student Options settings. For more information, see *Select Student Options Settings*.
Select By Hand	Click to select students by hand. **Note:** For more information, see *How to Select a Group of Students by Hand*.
[Select Function]	Click the arrow and choose a group function from the pop-up menu to begin working with your current student selection. The selected group function page appears. **Note:** By default, this button appears as **Select Function**. Once a function has been selected, the button appears as your selection for up to three days (if another function is not selected before then).

	Note: For more information, see *Select a Group of Students*.

Select an Individual Student

Select a student to view that student's pages.

How to Select an Individual Student by Last Name

1. On the start page, enter in the **Search Students** field the last name of a student whose record you want to review.

   Note: Alternatively, enter just the first few letters of the student's last name. Keep in mind that this may produce more results.

2. Click the **Search** icon. If you search for a student who has a unique last name, the search displays the one record it finds. If you search for a student who has a common last name, a list of student records appears in the Current Student Selection section.
3. Click the name of the student whose record you want to review. The page displays that student's record.

   Note: The page that displays the student's record can differ. For more information about student page views, see *Student Page Views*. For more information about selecting the default student page, see *How to Set the Default Student Page*.

   Note: To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about selecting students from a group of students, see *How to Select a Group of Students by Hand*. For more information about the Group Functions page, see *Work with Groups*.

How to Select an Individual Student by Student Number

1. On the start page, enter in the **Search Students** field the school identification number of the student whose record you want to review.
2. Click the **Search** icon. Because the same student number is never assigned to more than one student, your search produces just one name. The page displays that student's record.

Note: The page that displays the student's record can differ. For more information about student page views, see *Student Page Views*. For more information about selecting the default student page, see *How to Set the Default Student Page*.

How to Search for an Inactive Student

Use PowerSchool to search for the records of any student who has ever enrolled in your school. You can view the record of a student who has transferred to a new school, dropped out, or otherwise left your school.

1. On the start page, enter a forward slash (**/**) followed by the first few letters of the last name of the student whose record you want to review in the **Search Students** field.
2. Click the **Search** icon. A list of all active and inactive student records whose names start with those letters appear in the Current Student Selection section.

   Note: Notice the number of students on the list. To verify that this list includes active as well as inactive students, return to the start page and redo the search without the slash (**/**) before the last name. Fewer names on the resulting list appear if there are any inactive students, since the list includes only active students.

3. Click the name of the student whose record you want to review. The page displays that student's record.

   Note: The page that displays the student's record can differ. For more information about student page views, see *Student Page Views*. For more information about selecting the default student page, see *How to Set the Default Student Page*.

   Note: To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about selecting students from a group of students, see *How to Select a Group of Students by Hand*. For more information about the Group Functions page, see *Work with Groups*.

Select a Group of Students

On the start page, you can search for a group of students using the quick links or by using the **Search Students** field. Using the quick links, you can quickly search for students by the first letter of their last name, grade, or gender. When using the quick links, such as 11 for eleventh graders and F for females, the search criteria do not appear on the Student Selection page. Using the **Search Students** field, you can locate a group of students that match a specific set of criteria. For more information about fields, see *How to Search for*

Students by Other Fields. When using the **Search Students** field, the search criteria and the number of results appear on the Student Selection page.

Note: To search for an individual student, see *Select an Individual Student*.

How to Search for All Active Students

This is the easiest search, but it also produces the largest number of results.

1. On the start page, click **All**. A list of all active students appears in the Current Student Selection section.

   Depending on the number of students at your school, it can take a while to produce the list of students. The list displays the names of all students at your school and a number (in parentheses) at the top of the list. This number indicates how many records were returned by the search.

2. Click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information, see *Work with Groups*.

   Note: To work with an individual student, click the name of the student whose record you want to work with. For more information, see *Work with an Individual Student*.

How to Search for All Active/Inactive Students

Use PowerSchool to search for the records of any student who has ever enrolled in your school. You can view the record of a student who has transferred to a new school, dropped out, or otherwise left your school.

1. On the start page, enter a forward slash (**/**) in the **Search Students** field.
2. Click the **Search** icon. A list of all active and inactive students appears in the Current Student Selection section.

   Depending on the number of students at your school, it can take a while to produce the list of students. The list displays the names of all students at your school and a number (in parentheses) at the top of the list. This number indicates how many records were returned by the search.

3. Click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information, see *Work with Groups*.

Note: To work with an individual student, click the name of the student whose record you want to work with. For more information, see *Work with an Individual Student*.

How to Search for Students by Grade Level

1. On the start page, click a number to search by grade level. A list of all students in the specified grade level appears in the Current Student Selection section.

   Note: Alternatively, use the field name to search. In this case, enter **grade_level=** followed by the grade number in the **Search Students** field. This is helpful for when you want to search by criteria in addition to grade level.

2. Click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information, see *Work with Groups*.

   Note: To work with an individual student, click the name of the student whose record you want to work with. For more information, see *Work with an Individual Student*.

How to Search for Students by Gender

1. On the start page, click **M** to search for males or **F** to search for females. A list of all male or female students in your school appears in the Current Student Selection section.

   Note: Alternatively, use the field name to search. In this case, enter **gender=m** or **gender=f** in the **Search Students** field.

2. Click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information, see *Work with Groups*.

   Note: To work with an individual student, click the name of the student whose record you want to work with. For more information, see *Work with an Individual Student*.

How to Search for Students by Other Fields

Like many other applications, PowerSchool stores data in fields. A field is a unit of information defined by your PowerSchool administrator. PowerSchool comes with a set of standard fields used by all schools, but your school can add other fields that are particular to your needs. Additionally, fields are added to the field list with new versions of

PowerSchool. Click to display a list of all student-related fields stored in your school's PowerSchool database.

1. On the start page, click **View Field List**. The Field List pop-up appears.
2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
3. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Student** field.
4. Enter a field operator and value after the field in the **Search Student** field.

   Note: For more information about comparators, see *How to Use Comparators*.

5. Click the **Search** icon. A list of all students matching the search criteria you entered appears in the Current Student Selection section.

   Note: If you search for a student who has a value for a field matching no other student's value, the search displays the one record it finds.

6. Click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information, see *Work with Groups*.

   Note: To work with an individual student, click the name of the student whose record you want to work with. For more information, see *Work with an Individual Student*.

How to Search for Students by Student Search Code

Student Search Codes are available in the View Fields List window. These search codes can be used to target specific groups of students. They can be used individually to search for students, or they can be combined with other search codes or with fields from the field list. For more information, see Knowledgebase article 7671 available on PowerSource.

1. On the start page, click **View Field List**. The Field List pop-up appears.
2. Enter an asterisk (*) in the **Filter** field. The Students Search Code list appears.
3. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Student** field.
4. Enter a field operator and value after the field in the **Search Student** field.

   Note: For more information about comparators, see *How to Use Comparators*.

5. Click the **Search** icon. A list of all students matching the search criteria you entered appears in the Current Student Selection section.

Note: Smart search does not work with Student Search Codes.

How to Select a Group of Students by Hand

This selection process is helpful to select a group of students from a larger group.

1. On the start page, select the group of students using a search method, such as by gender, grade, or ethnicity. A list of students appears in the Current Student Selection section.
2. Click **Select By Hand** to narrow the group of students even further.
3. Do one or more of the following:
    - Select the checkbox in the header row to select all students.
    - Deselect the checkbox in the header row to deselect all students.
    - Select the checkbox next to each student you want to work with.
    - Deselect the checkbox next to each student you do not want to work with.

    Note: Your checkbox selections are retained as you navigate through the different pages of the search results.

4. Click **Update Selection**.
5. Click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information, see *Work with Groups*.

Advanced Search and Select

While the searches described in the sections *Select an Individual Student* and *Select a Group of Students* provide enough information to get you started, you will need to perform other searches that produce narrower results. With some practice, the advanced searches will soon become a part of your daily routine.

How to Search for Students by Activities

Searching for groups of students who belong to certain clubs or participate in particular activities is a little different than searching by grade level or gender. Rather than telling PowerSchool to search for records whose field values match the criteria you enter, tell it to search for records whose specified activity field value (for example, volleyball, chess_club, or drama) is not blank.

If there is any value in the field, the student does participate. If the field is blank, the student does not participate. This can seem confusing, but after reviewing the following example, you will realize that it is actually very easy to search for students by activity. For example, practice this type of search by finding students in your school who are in the chess club.

1. On the start page, enter in the **Search Students** field an activity field name such as **chess_club#**. The number sign (#) means does not equal. For example, by entering **chess_club#** followed by nothing, you are telling PowerSchool to search for all records whose chess club field does not equal "blank."
2. Click the **Search** icon. Though all students have a chess club field tied to their record, only those students who are on the chess club team have a value in the chess club field. Non-chess club students have nothing in the chess club field. Therefore, PowerSchool eliminates them from the results of the search.

   Note: All student records have all activity fields associated with them.

   If no students match the search criteria, an alert message appears indicating that no students match your selection. Otherwise, a list of all students who participate in the specified activity appears in the Current Student Selection section.

3. Do one of the following:
   - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
   - To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about the Group Functions page, see *Work with Groups*.

How to Search for Students by Ethnicity

1. On the start page, enter **ethnicity=** followed by the code for the ethnic group you want to search in the **Search Students** field.
2. Click the **Search** icon. A list of all students of the specified ethnicity in your school appears in the Current Student Selection section.
3. Do one of the following:
   - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
   - To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about the Group Functions page, see *Work with Groups*.

How to Search for Students with Secondary Enrollments

Search for students who are enrolled at one school and taking classes at a different school. From the resulting list of students, you can select individual students. The following search codes are available for the Search Student field. The **=** operator is required:

Code	Result
*secondarystudents=all *secondarystudents=	A list of students in all grades who are taking classes in the current school, but not enrolled in the school.
*secondarystudents=[grade_level]	A list of students in the selected grade level who are taking classes in the current school, but not enrolled in the school. For example, ***secondarystudents=5** displays all 5th graders with secondary enrollments in the current school.
*allstudents=all *allstudents=	A list of all students in all grades who are taking classes in the current school, including those who are enrolled in the school.
*allstudents=[grade_level}	A list of all students in the selected grade level who are taking classes in the current school, including those who are enrolled in the school. For example, ***allstudents=5** displays all 5th graders, including those with secondary enrollments in the current school.

1. On the start page, enter ***secondarystudents=** in the **Search Students** field.
2. Click the **Search** icon. A list of all students currently taking classes at the school appears in the Current Student Selection section.
3. Do one of the following:
    - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
    - To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about the Group Functions page, see *Work with Groups*.

How to Search for Students by Lunch Status

Search for students by using the lunch status field. Use the following codes to search for students based on how much they pay for lunch:

- **F**=Free
- **R**=Reduced
- **P**=Full Pay
- **E**=Exempt
- **FDC**=Free Direct Certification

1. On the start page, enter **lunchstatus=r** in the **Search Students** field.
2. Click the **Search** icon. A list of all students who receive reduced price lunches appears in the Current Student Selection section.
3. Do one of the following:
    - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
    - To work with the group of students, click the **[Select Function]** arrow and choose a function from the Group Functions pop-up menu. For more information about the Group Functions page, see *Work with Groups*.

How to Search for Students by GPA

Search for a group of students who are receiving a particular grade point average. This function is especially useful to locate honor roll students or those receiving failing grades.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Search By GPA**. The Search By GPA page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Select the applicable **Scan these** option to indicate which students to include.
5. Complete any combination of the remaining fields. Use the following table to enter information in the fields:

Field	Description

Who are enrolled in this	Enter the **course.section** number to search by course. Enter the period to search by period. To search by teacher, choose a teacher from the pop-up menu.
Whose cumulative GPA is	Choose the cumulative GPA cut-off criteria from the pop-up menu and enter the percentage point of the cutoff. Choose a GPA calculation method from the pop-up menu.
Whose term GPA is	Enter a store code in the field, such as **Q2** or **S1**. Choose the term GPA cut-off criteria from the pop-up menu and enter the percentage point of the cutoff. Choose a GPA calculation method from the pop-up menu.
Whose current GPA is	Choose the current GPA cutoff criteria from the pop-up menu and enter the percentage point of the cutoff. Choose a GPA calculation method from the pop-up menu.
Who were enrolled as of this date	Enter the enrollment cutoff date using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Who match this search	Enter other criteria to search for students, such as activity membership.

6. Click **Submit**. The Group Functions page displays the number of selected students.
7. Click the **Current student selection [number]** to view the list of students. The Student Selection page appears.
8. Do one of the following:
    - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
    - To work with the group of students, choose an option from the **Select a function for this group of students** menu. For more information about the Group Functions page, see *Work with Groups*.

How to Search for Students by Grades/Attendance

This report provides great flexibility in finding students based on their grades or attendance records. By using a combination of options, you can find any number of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Search By Grades/Attendance**. The Search By Grades/Attendance page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Attendance** under Functions in the main menu and then click **Search by Grades/Attendance** or **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Select the applicable **Scan these** option to indicate which students to include.
5. Enter the minimum number of classes necessary to meet the search criteria. For example, to list students failing at least two classes, enter **2**. To list students receiving an A in any class, enter **1**.
6. Complete any combination of the remaining fields. Use the following table to enter information in the fields:

Field	Description
Scan for this final grade	1. Select the checkbox. 2. Choose a comparator from the pop-up menu: 3. Enter the specific letter grades for which you want to scan. **Note:** Separate multiple grades with commas.
Scan for this final grade percentage	1. Select the checkbox. 2. Choose a comparator from the pop-up menu. 3. Enter the specific percentage for which you want to scan.
Scan for this citizenship grade	1. Select the checkbox. 2. Choose a comparator from the pop-up menu. 3. Enter the specific citizenship grades for which you want to scan.

	Note: Separate multiple grades with commas without spaces. **Note:** Use **=** to search for students who have that citizenship grade or use **#** to search for students who do not have that citizenship grade.
Scan for attendance	1. Select the checkbox. 2. Select the attendance mode from the **Scan this attendance mode** pop-up menu. 3. Select the attendance code to scan for from the **for this attendance code** pop-up menu. 4. Select a comparator from the next pop-up menu.. 5. Enter the number of instances of the attendance code in the **Periods** field. 6. Select one of the following: • **Cumulative per Section Enrollment Record** to scan for the number of attendance codes that are cumulative for each class. • **Total Count** to scan for the number of attendance codes regardless of the section enrollment record.
When scanning attendance	1. Select one of the following: • **Scan all attendance records** option to scan attendance codes during the current term. • **Only scan records in this date range** option to scan attendance codes for a specific time frame within the selected term. 2. If **Only scan records in this date range** is selected, enter the first and last dates of the date range or click the **Calendar** icon to select the dates.
Scan for grades in	1. Choose one of the following from the pop-up menu: • **Historical Grade** • **Current Grades** 2. Enter a value in the **Store Code/Final Grade** field. For example, if you choose historical grades, enter the store code/final grade, such as **Q1** or **Q2**. This scans the grades for the store code entered for the year of the currently selected term. Or, if you are working in Q3 and enter a store code of **Q1**, the system

	scans the Q1 grades for the current year. It does not scan grades from previous years. To do so, change the currently selected term. For more information, see *How to Change Terms*.
Scan for all classes enrolled	1. Select one of the following: • **As of This Date** to scan for all classes enrolled either as of a specified date. • **Anytime During the Current Term** to scan for all classes enrolled anytime during the current term. 2. If **As of This Date** is selected, enter a date or click the **Calendar** icon to select a date.
Results	Select one of the following: • **Make this the current selection of students** to continue working with the resulting group of students. • **Display matching students & sections** to display each matching student and the term, section, course name, and teacher for which the criteria are met.

7. Click **Submit**. The Group Functions page displays the number of selected students.
8. Click the **Current student selection [number]** to view the list of students. The Student Selection page appears.
9. Do one of the following:
    - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
    - To work with the group of students, choose an option from the **Select a function for this group of students** menu. For more information about the Group Functions page, see *Work with Groups*.

How to Search for Students by Perfect Attendance

Use this report to find students who have perfect attendance records during a specified period.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Attendance, choose **Search for Perfect Attendance**. The Search for Perfect Attendance page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Select the applicable **Scan these** option to indicate which students to include.
5. Use the following table to enter information in the fields:

Field	Description
Attendance mode to use	Select the attendance mode from the pop-up menu.
Date range to scan	Enter the first and last days of the date range to scan using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Disregard these codes when searching	Enter the attendance codes that do not render students absent. For example, if your school excuses absences when a student performs volunteer work, enter **V** if that is the code for a volunteer absence at your school.

6. Click **Submit**. The Group Functions page displays the number of selected students.
7. Click the **Current student selection [number]** to view the list of students. The Student Selection page appears.
8. Do one of the following:
   - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
   - To work with the group of students, choose an option from the **Select a function for this group of students** menu. For more information about the Group Functions page, see *Work with Groups*.

Comparators

Comparators are tools that you use to search and retrieve records by combining two or more criteria. A combination of comparators and fields are used in searches to narrow the results to a very small group of students at your school. There are many operators or "comparators," but some of the most common are included in this section.

A simple example of a search using a comparator is **last_name=jones**. This is called a search command because you are commanding PowerSchool to perform a search that contains that particular line of text. In other words, you are telling the PowerSchool system to find all students whose last name is Jones. All search command lines are broken into three parts:

- **Field name:** last_name, first_name, or student_number
- **Comparator:** =, #, >, or <
- **Search argument or value:** Jones, becky, or 2301923

The general format is:

[field name][comparator][search argument]

How to Use Comparators

The following are some of the most common comparators.

= Comparator

Use this comparator to search for records that are the value of the field. Suppose you want to find all students in your school with the last name of Jones. Find them with the following search command:

last_name=Jones

This instructs PowerSchool to go through each student record and return those records that have Jones in the last_name field.

< Comparator

Use this comparator to search for records that are less than the value of the field. Suppose you want to find all students in your school who are in a grade level less than 12th grade. Find them with the following search command:

grade_level<12

This instructs PowerSchool to go through each student record and return those records that have any value less than 12 in the grade_level field.

> Comparator

Use this comparator to search for records that are greater than the value of the field. Suppose you want to find all students in your school who are in a grade level greater than 9th grade. Find them with the following search command:

grade_level>9

This instructs PowerSchool to go through each student record and return those records that have any value greater than 9 in the grade_level field.

<= Comparator

Use this comparator to search for records that are less than or equal to the value of the field. Suppose you want to find all students in your school who are in a grade level less than or equal to 12th grade. Find them with the following search command:

grade_level<=12

This instructs PowerSchool to go through each student record and return those records that have any value less than or equal to 12 in the grade_level field.

>= Comparator

Use this comparator to search for records that are greater than or equal to the value of the field. Suppose you want to find all students in your school who are in a grade level greater than or equal to 10th grade. Find them with the following search command:

grade_level>=10

This instructs PowerSchool to go through each student record and return those records that have any value greater than or equal to 10 in the grade_level field.

Comparator

Use this comparator to search for records that are not the value of the field. Suppose you want to find all students in your school who are not in 12th grade. Find them with the following search command:

grade_level#12

This instructs PowerSchool to go through each student record and return those records that do not have 12 in the grade_level field.

"in" Comparator

Use this comparator to verify that the value of the field matches any argument in the list you provide. For example, if you want a list of all the ninth, tenth, and eleventh graders at your school, enter the following search command line:

grade_level in 9,10,11

In this example, the field is grade_level, the comparator is "in," and the search argument is 9,10,11. Note that the items in the argument are separated with commas. This tells PowerSchool to find all students in grade levels 9, 10, and 11. PowerSchool goes to the grade_level field in each student record and returns the records where the entry is 9, 10, or 11.

"contains" Comparator

Use this comparator to search for records that have the value of the field. Suppose you want to find all students in your school who live on Cherry Lane. Find them with the following search command:

mailing_street contains Cherry Lane

This instructs PowerSchool to go through each student record and return the records that have Cherry Lane in the mailing_street field. It does not matter if the value of a student's mailing_street field is 194 Cherry Lane or 24230 Cherry Lane Parkway. If Cherry Lane appears anywhere in the field, PowerSchool considers it a match and includes the record in the search results.

Note: You cannot use the contains comparator for numerical fields, such as student numbers.

"!contain" Comparator

The opposite of the contains comparator is "!contain." Use this comparator to find records that do not have the value of the field. Perhaps you want to find all students in your school whose phone numbers does not contain the number five. Use the following search command:

home_phone !contain 5

This instructs PowerSchool to go through each student record and return the records that do not have 5 in the home_phone field. It does not matter if the number is in the area code, the prefix, or the phone number. If there is not a 5 in the home_phone field, PowerSchool considers it a match and includes the record in the search results.

"@" (Wildcard) Comparator

Suppose you want to find all students whose first names start with "rob." This includes anyone named Rob, Robert, Robbie, Robby, Robin, or Roberta. To find these students, enter the following in the search field:

first_name=rob@

As you can imagine, the wildcard is a very powerful comparator. There is no rule as to where you place it in the command. It can be used anywhere to take the place of a letter, word, or phrase. Enter **first_name=@ie** to find student whose first name ends in "ie." This search produces results like Terrie, Debbie, or Eddie but not Terry, Debby, or Eddy. The command **first_name=s@n** produces results with names such as Susan or Stan.

Note: You cannot use the @ or wildcard comparator for numerical fields, such as student numbers.

Search for Preselected Groups of Students

The selection processes make it easier for you to find a group because the group is made up of students in a specific class. Select just the students in one class or add the students in a class to another group you have already selected.

How to Use Teacher Schedules to Search for Groups of Students

Use this function to select a teacher whose schedule you want to view. Once you display a teacher's schedule, select the students in any of that teacher's classes.

To select a group of students in a class or section, skip to Step 3. To add the students in a class or section to another group, complete the entire procedure.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. On the start page, search for and select a staff member. For more information, see *Staff Search*.
3. Click **Current Schedule**. The teacher schedule for that teacher appears.
4. Click the number in the Enrollment column for the class you want to display. The Class Roster page appears.
5. Do one of the following:
    - Click **Make Current Student Selection** to select the students in the class as the only group you want to work with.
    - Click **Add to Current Student Selection** to add this group to a previously selected group.

    The Group Functions page asks what to do with your selection of students.

6. Click the underlined number to view the list of students. The Student Selection page appears.
7. Do one of the following:

- To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
- To work with the group of students, choose an option from the **Select a function for this group of students** menu. For more information about the Group Functions page, see *Work with Groups*.

How to Use the Master Schedule to Search for Groups of Students

The master schedule displays the schedules for all teachers in your school. All classes for each teacher are noted, along with the number of students in each class. Select a group of students in the same class.

To select a group of students in a class or section, skip to Step 3. To add the students in a class or section to another group, complete the entire procedure.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Choose **Master Schedule** under Functions in the main menu. The Master Schedule appears.

   Note: The Master Schedule page must be set to View By Matrix in order to access the Class Roster page. For more information, see *How to Set Master Schedule Preferences*.

3. Locate the staff member who teaches the students you want to select.
4. Locate the class and section.
5. Click the number of students in the section. The Class Roster page appears.

   Note: The class roster is the central point from which you can view and manage the students enrolled in a specific class, including viewing the class roster, mass dropping students, mass dropping and rescheduling students, mass enrolling students into a class, and mass enrolling students into a different class. For more information, see *Class Roster*.

6. Do one of the following:
   - Click **Make Current Student Selection** to select the students in the class as the only group you want to work with.
   - Click **Add to Current Student Selection** to add this group to a previously selected group.

   The Group Functions page asks what to do with your selection of students.

7. Click the underlined number to view the list of students. The Student Selection page appears.
8. Do one of the following:
    - To work with an individual student, click the name of the student whose record you want to work with. The page displays that student's record.
    - To work with the group of students, choose an option from the **Select a function for this group of students** menu. For more information about the Group Functions page, see *Work with Groups*.

Current Student Selection

PowerSchool remembers the most recently selected group of students. After searching for students, the Search Students page displays a list of student records matching the search criteria in the Current Student Selection section. To refine the list of student records matching the search criteria, you can use the Advanced setting, which to modify the current student selection. Once established, the current student selection is accessible via the start page or the Student Selection page.

How to Set the Current Student Selection

1. On the start page, verify the **Advanced** checkbox is not selected.
2. On the start page, search for and select a student or group of students. For more information, see *Student Search*. A list of student records matching the search criteria appear in the Current Student Selection section.

How to Set the Current Student Selection using the Advanced Setting

1. On the start page, select the **Advanced** checkbox. The Search Result section appears above the Current Student Selection section.
2. Search for and select a student or group of students. For more information, see *Student Search*. A list of student records matching the search criteria appears in the Search Results section.
3. Use the following table to enter information in the fields:

    Note: Use the pagination to navigate the search results.

Field	Description
[Student]	Do one or more of the following:

	• Select the checkbox in the header row to select all students. • Deselect the checkbox in the header row to deselect all students. • Select the checkbox next to each student you want to work with. • Deselect the checkbox next to each student you do not want to work with.
Student	The student's last and first name.
Add	Click to add the selected students in the Search Results section to the current selection. Selected students appear in the Current Student Selection section.
Subtract	Click to remove the selected students in the Search Results section from the current selection. Selected students no longer appear in the Current Student Selection section.
Within	Click to adjust the current selection to only the selected students in the Search Results section. Only the selected students appear in the Current Student Selection section.

4. Click **Set** to make the selected students in the Search Results section the current selection. Selected students appear in the Current Student Selection section.

How to Access the Current Student Selection from the Start Page

On the start page, search for and select a student or group of students. For more information, see *Student Search*. A list of student records matching the search criteria appear in the Current Student Selection section.

How to Access a Current Student Selection from the Student Selection Page

1. On the start page, search for and select a student or group of students. For more information, see *Student Search*. A list of student records matching the search criteria appear in the Current Student Selection section.

Note: If only one student is found, the search displays the one record.

2. Click the name of the student whose record you want to review. The page displays that student's record.
3. Click **List** in the upper left corner. The Student Selection page displays the current student selection.

Stored Searches

Stored searches find preset groups of students. When storing a search, you are storing the criteria used to search for a group of students, not the list of students' names that result from a search. For example, store a search of all student government representatives to efficiently mark the group as excused when they miss classes due to meetings. Because the names of the representatives can change throughout the year, it is best to store a query that includes all students participating in the government activity. To save a specific list of student names, store the selection instead of the search criteria. For more information about storing a selection, see *Stored Selections*.

Either set up and save a search or use a search that someone else created on your PowerSchool system.

How to Search for Students Using Stored Searches

1. On the start page, click **Stored Searches**. The Stored Searches page appears.
2. Click **Run Search** next to the stored search. The Group Functions page appears.
3. Click the underlined number to view the list of students. To work with the group of students, choose a menu option. For more information about the Group Functions page, see *Work with Groups*.

How to Create a Stored Search

Create a new group of students for whom you and other users can search. To create a stored search that is similar to another stored search, copy the command string from another search and paste it into a new search group. You must then make the necessary changes or additions to the command string for the new group.

1. On the start page, click **Stored Searches**. The Stored Searches page appears.
2. Click **New**. The Edit Stored Search page appears.
3. Use the following table to enter information in the fields:

Field	Description

Name	Enter the name of the stored group for which you want to search.
Search Instructions	Enter the search commands. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** Use one command on each line. Field names must be entered exactly as they appear in the field list.

4. Click **Submit**. The Stored Searches page displays the new stored search.

How to Edit a Stored Search

If a search is not finding the correct students, there could be a problem with the search command. On the other hand, perhaps the criteria for a specific group have changed. In either case, you must edit the search criteria.

Note: All PowerSchool users on your system will be impacted by your change. Contact other users before editing the criteria of a stored search.

1. On the start page, click **Stored Searches**. The Stored Searches page appears.
2. Click the name of the stored search you want to edit. The Edit Stored Search page appears.
3. Edit the information as needed. For field description see *How to Create a Stored Search*.
4. Click **Submit**. The Stored Searches page reappears.

How to Delete a Stored Search

1. On the start page, click **Stored Searches**. The Stored Searches page appears.
2. Click the name of the stored search you want to delete. The Edit Stored Search page appears.
3. Click **Delete**.
4. Click **Confirm Delete**. The Selection Deleted page appears.

5. Click Back to return to the Stored Searches page.

Stored Selections

Store selections of students or staff to quickly and easily retrieve a group of students or staff that you work with frequently. Whereas a stored search holds criteria that can result in a varying list of students or staff every time you utilize the stored search, stored selections hold the actual list of students or staff at the time you create the stored selection.

For example, assume a group of four students reads the announcements over the loudspeaker each morning for a week. As the attendance clerk, you might need to excuse those students' tardies for their first period classes. On Monday, create a stored selection of the four students so that you can easily change their attendance on the days when it is necessary.

Users can create compounded stored selections; that is, use stored selections either to add to other stored selections or to create new ones. Indicate if the new selections include either any or all of the criteria. For example, if you want to report on the announcement reader groups for the rest of the month, combine the stored selections for each week's group.

Since stored selections are user-specific, users manage their own set of stored selections. However, users can publish a stored selection to all users for your school. Stored selections are snapshots of a particular time and do not change when student- or staff-related information changes; therefore, it is suggested that users periodically delete and re-create their stored selections to refresh the data.

How to Store a Selection

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Save Stored Selection**. The Stored Selections page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Name of new selection	Enter a name for the stored selection.
Save	Select this option.

5. Click **Submit**. The Stored Selections page displays the new stored selection.
6. Click **Go Functions** to perform group functions with this stored selection. For more information about group functions, see *Work with Groups*.

How to Edit the Name of a Stored Selection

Though you cannot remove records from a stored selection, you can change its name. To add records to a stored selection, see *How to Use Stored Selection Options*.

1. On the start page, click **Stored Selections**. The Stored Selections page appears.
2. Click the name of the stored selection you want to edit. The Edit Stored Selection page appears.
3. Edit the name of the stored selection as needed.
4. Click **Submit**. The Stored Selections page displays the edited stored selection.

How to Use Stored Selection Options

After creating a stored selection, you can add records to a selection or combine it with another stored selection.

1. On the start page, search for and select a group of students that you want to use to add to or combine with another stored selection. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Save Stored Selection**. The Stored Selections page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to select one of the options:

Field	Description
Add	To add records to the current selection from one or more stored selections, select the checkboxes next to the stored selections and select the **Add** option. Leave **current selection** as the name of the new selection.
Filter	To include only records in the current selection that are also included in any chosen stored selections, select the checkboxes next to the stored selections and select the **Filter** option. Leave **current selection** as the name of the new selection.
Create a new selection based on records that belong to ANY of the checked selections	To create and store a new selection that includes all records from all of the selected stored selections, select the checkboxes next to the stored selections and select this option. Enter a name for the stored selection.
Create a new selection based on records that belong to EVERY checked selection	To create and store a new selection that includes records that exist across all of the chosen stored selections, select the stored selections and select this option. Enter a name for the stored selection.

5. Click **Submit**. The Stored Selections page displays the new or modified stored selection.

How to Delete a Stored Selection

Users can delete any or all of their stored selections, including the stored selections that they publish. Stored selections are snapshots of a particular time and do not change when student- or staff-related information changes; therefore, it is suggested that users periodically delete and re-create their stored selections to refresh the data.

1. On the start page, click **Stored Selections**. The Stored Selections page appears.
2. Select the **Delete** option.
3. Select the checkboxes next to the names of the stored selections to be deleted.
4. Click **Submit**. The Stored Selections page appears without the deleted stored selections.

How to Publish a Stored Selection

Since stored selections are user-specific, users manage their own set of stored selections. However, users can publish a stored selection to all users for your school. Publishing a stored selection at the district level affects all schools on the system. Develop a process or policy to control stored selections that have been published unnecessarily.

Users at the school (or district) can delete the stored selections that others publish. When a user that publishes a stored selection deletes it, that stored selection is deleted for all users.

1. On the start page, click **Stored Selections**. The Stored Selections page appears.
2. Select the **Publish** option.
3. Select the checkboxes next to the names of the stored selections to be published.
4. Click **Submit**. The Stored Selections page displays the stored selections that have been published.
5. Sign in using a different username and password to verify that the system published the stored selections to other users.
6. On the start page, click **Stored Selections**. The Stored Selections page displays the published stored selections.

Work with an Individual Student

When you select a student, PowerSchool displays the student pages menu. From this menu, you can manage the student record in a variety of ways. The items on the student pages menu do not necessarily follow a particular sequence; therefore, use this section as a reference and review those sections that you need for a given task.

When you view the student pages menu, your computer displays the view that you used the last time you looked at a student page. Thus, if you viewed the Demographics page for Joe Smith during your last PowerSchool session, the Demographics page for Jane Johnson appears when you select her student record.

Note: If the alert "This student's schedule is incomplete." appears, the selected student has an incomplete schedule. To complete a student's schedule, navigate to the Modify schedule page via **Start Page > Select Student > Modify Schedule**. For more information, see *Course Requests and Schedule*.

How to Enroll a Student

When PowerSchool is set up at your school, the data for most students is imported from your previous system. However, there will always be students who must be enrolled individually because they are new to your school. If you have the proper permissions, you can enroll an individual student in your school.

If the new student is from the same family as an existing student at the school or in the district, you can link the students to make it easier to enter and manage shared demographic information. Options to match the new student to an existing student are available when enrolling a student.

Note: If you know that the new student shares a household with an existing student, see *How to Enroll a New Student Living in the Same Household*.

1. On the start page, choose **Enroll New Student** under People in the main menu. The Enroll New Student page appears.

   Note: Alternatively, you can choose **Special Functions** under Functions in the main menu and click **Enroll New Student**.

2. Use the following table to enter information in the Student Information section:

Field	Description
Student's Name (Last, First Middle)	Enter the student's name (last, first, then middle name). Names that include spaces (such as **Mary Jo**) can be included in any of the three fields. The maximum number of characters and spaces is 50 for the last name field, 50 for the first name field, and 30 for the middle name field.
DOB	Enter the student's date of birth using the format mm/dd/yyyy or mm-dd-yyyy. If you enter a date of birth, students with the same name and the same date of birth will appear as potential duplicate student records. If you enter a date of birth that does not match any existing student records with the same name, the new enrollment will not be considered a potential duplicate. If you do not enter a date of birth, only the Name, Phone Number, and Social Security Number fields are considered when checking for duplicate students.
Student Number	Enter the student number. If you leave this blank, PowerSchool will assign one to the student.

Gender	Choose the student's gender from the pop-up menu.
Social Security Number	Enter the student's Social Security number.
Phone Number	Enter the student's phone number.
Enrollment Date	If it is not the date displayed, enter the student enrollment date using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Full-Time Equivalency	Choose the student's FTE from the pop-up menu for this school enrollment.
Grade Level	Choose the grade level the student will be in when he or she enters your school from the pop-up menu.
Entry Code	Choose the reason the student is entering your school from the pop-up menu.
Track	Choose the student's track from the pop-up menu. **Note:** For more information, see *Calendar Setup*.
District of Residence	Choose the district in which the student lives from the pop-up menu. If you have the appropriate permissions, you can click **District of Residence** to access the Districts of Residence page. **Note:** For more information, see *Districts of Residence*.
Fee Exemption Status	Choose the student's fee exemption status from the pop-up menu in the School Fee Information section: • **Student not Exempted** • **Student Exempted from Course Fees** • **Student Exempted from School Fees**

	• **Student Exempted from All Fees** School and course enrollment fees are automatically assigned to students when they enroll in school or in a course. Students can be exempted individually from having these fees assigned to them automatically by using the Fee Exemption Status pop-up menu. While you can indicate to the system that school and/or course enrollment fees are not to be assigned automatically, this does not prohibit fees being assigned manually. **Note:** For information about exempting a group of students, see *School Information*.
School	The school in which you are enrolling the student.

3. Use the following table to enter information in the Information for Family Match section:

Field	**Description**
Enroll without Linking or Copying Information	Select this option to skip all linking and copying functions. All other standard enrollment functions occur when you click **Submit**. Use for students with no known siblings in the district.
Search for Family Members to Link to and Copy Information From	Select this option to initiate a search for potential family members from which shared data can be copied when you click **Submit**. **Note**: The search for siblings performs an “or” search. Students with active or inactive status who match any of the search criteria display on the search results page as a potential sibling. For example, if you enter the mother’s name along with the street address, a student who has the same mother’s name or the same street address displays on the resulting search page.
Family ID	Enter the family ID, if applicable. **Note**: This field is provided only for districts and schools that used it previously to associate related students. Family management

	functionality is based upon relationships stored in the Relationships table.
Mother's Name	Name of the enrolling student's mother.
Father's Name	Name of the enrolling student's father.
Guardian's Name	Name of the enrolling student's guardian.
Sibling's Name (Last, First)	Name of a sibling who is also a student within the district. There are two separate fields since a student's name is stored as unique fields for last name and first name.
Include Student's Last Name in Search	Select the checkbox to include the last name of the enrolling student in the family match search. All students who share the same last name will be included in the search results.
Street, Apt/Suite	Enter the street address in the first field, and apartment or suite number in the second field, if any.
City, State, Zip	Enter the city, state, and zip code for the street address.
Geocode	The latitude/longitude pair that represents the geographical location of the home address. This field is read-only and is automatically generated when the address is validated or imported. For more information about geocodes, see *Address Management*. Click **Validate** to perform address validation. For more information about performing address validation, see *Perform Interactive Address Validation*.

4. Click **Submit**. PowerSchool searches for duplicate student records:
    - If there are no records matching that of the new student, the Schedule page appears; you can then add classes to the student's schedule. For more information, see *Add Section Enrollments*.
    - If there are similar records to the one you created, the Check for Duplicate Students page asks you to check for duplicate records from a list:

- If the student’s name appears on the Check for Duplicate Students page, click the student name to display the Student Selection page. Re-enroll the student, if necessary. For more information about reenrollment, see *How to Reenroll in School*.
- If the student’s record is not found on the Check for Duplicate Students page, click **Enroll**. Any matches found based on the family management search criteria display on the Family Search Results page.

  Note: For more information about linking groups of students, see *How to Mass Create Family Links*.

How to Enroll a New Student Living in the Same Household

Family management provides the ability to enroll a student from an existing student record, allowing shared data to be automatically copied to the enrolling students record.

1. On the start page, search for and select the student that has a family relationship to the enrolling student. For more information, see *Student Search*.
2. Click **Functions**. The Functions page appears.
3. Click **Enroll New Student Living in the Same Household**. The Enroll New Student page appears.
4. Use the table in *How to Enroll a Student* to enter information in the fields.
5. Click **Submit**. PowerSchool searches for duplicate student records:
   - If the students name appears on the Check for Duplicate Students page, click the student's name to display the Student Selection page. Re-enroll the student, if necessary.
   - If the students record is not found on the Check for Duplicate Students page, click **Enroll**. The Functions page appears. On the Student Selection menu, click **Demographics View**. The new student record displays the information copied from the shared fields of the linked student's record.

How to Open the Student Page

1. On the start page, search for and select a student. For more information, see *Student Search*. The student pages menu displays the selected default view. For more information, see *Personalize*.
2. Choose an item from the student pages menu to view a different student page.

Student Page Layout

Each student page looks different, but the top of each displays the name of the page, student's name, grade level, ID number, and school name. In the student pages menu to the left side of the page, all of the items listed are possible actions performed or items viewed on a student's record. This is where you will start the activities described in this section.

Quick Lookup Page

The Quick Lookup page displays commonly used information, such as the student's schedule, teachers, current grades, and attendance record.

If the student is enrolled in more than one school, additional Quick Lookup tabs appear. Each of the tabs includes the school abbreviation. When viewing the Quick Lookup page from the context of the student's home school, the first tab reflects the student's home school. The subsequent tabs are for the remote schools. When viewing the Quick Lookup page from the context of one of the student's remote schools, the first tab is for the student's remote school. The subsequent tabs are for the home school and other remote schools.

Note: If a room has been defined for a section, the room number appears next to the teacher's name.

How to View the Quick Lookup Page

1. On the start page, search for and select a student. For more information, see *Student Search*. The student pages menu displays the selected default view. For more information, see *Personalize*.
2. Click **Quick Lookup**. The Quick Lookup page appears.
3. Use the following table to view information in the Attendance By Class section:

Field	Description
Exp.	The expression indicates the period and day combination of the course.
Last Week	• Blank indicates class meets that day and the student is present. • A dot indicates class does not meet that day. • An A indicates class meets that day and the student was absent.

	Shaded indicates school is not in session and/or the student is not enrolled on that date. **Note:** Other information may not appear unless school is in session and/or the student is currently enrolled.
This Week	- Blank indicates class meets that day and the student is present. - A dot indicates class does not meet that day. - An A indicates class meets that day and the student was absent. - Shaded indicates school is not in session and/or the student is not enrolled on that date. **Note:** Other information may not appear unless school is in session and/or the student is currently enrolled.
Course	- The name of the course. - The teacher teaching the course. - The room number where the course is taught. - Click a teacher's name to send that teacher an email message. - Click the **Section Teachers** icon next to the teacher's name to view the teachers assigned to the class. The Section Teachers pop-up appears. When done viewing, click the **x** to close the Section Teachers pop-up. **Note:** This icon appears only if there is more than one teacher assigned to the class.
[Term]	- The reporting term. - Blank indicates no PGFinalGrades record exist for the student/class/termbin. - Two dashes indicate a PGFinalGrades record exists for the student/class/termbin, but the "Grade" is blank. - To view the assignments and their scores that comprise the final grades for a term, click the score in the appropriate term column. For more information, see *How to View Student Assignment Scores*.

	Note: Additional information, such as overall grade, percentage, and citizenship, may appear based on school settings.
Absences	• The number of absences per reporting term. • Lower-case attendance codes indicate that the teacher took attendance. • Upper-case attendance codes indicate that an attendance clerk or office staff member took attendance. • Click any absences to display details on the Dates of Attendance page.
Tardies	The number of tardies per reporting term.
Attendance Totals	• The total number of absences and tardies for each term. • The attendance totals can be used for reports. • The total number of tardies for each term.
Current Weighted GPA	The student's current weighted GPA. **Note:** Only appears for the student's home school.

4. If your school uses Daily attendance, use the following table to view information in the Attendance By Day section:

Field	**Description**
Last Week	• Blank indicates class meets that day and the student is present. • A dot indicates class does not meet that day. • An A indicates class meets that day and the student was absent.
This Week	• Blank indicates class meets that day and the student is present. • A dot indicates class does not meet that day.

	• An A indicates class meets that day and the student was absent.
Absences	• The number of absences per reporting term. • Click any absences to display details on the Dates of Attendance page.
Tardies	The number of tardies per reporting term.
Attendance Totals	The total number of absences and tardies for each term.

5. Click S**how dropped classes** also to view records for dropped classes. The dropped classes appear on the page with the other classes.
6. Click the **Standards Grades** tab to view standards grades for the selected student. For more information, see *Standards Grades Classic View Page*.

How to View Student Assignment Scores

1. On the start page, search for and select a student. For more information, see *Student Search*. The student pages menu displays the selected default view. For more information, see *Personalize*.
2. Click **Quick Lookup**. The Quick Lookup page appears.
   Click on the score listed to view the Scores page.

   Note: You can also access the Scores page from the Term Grades page and the All Enrollments page.

3. On the Scores page, view the assignments and the selected student's scores for that class.

   Note: Assignments created in PowerTeacher Pro are noted on the Scores page. See the legend at the bottom of the page to understand the icons that appear on the page.

   - Click **View** to see assignment details.
   - Click on the standards icon to view the scores for the standards associated to the assignment.

Print A Report

Click the **Print A Report** link on the Student page menu to display the Print A Report page to print a report for the selected student. This is the same page that appears when you click **Functions** > **Print Reports For This Student**. For more information, see *How to Run a Report for a Single Student*.

Switch Student

Click the Switch Student link on the Student page menu to display a search dialog to look for other student records. Enter the name or partial name of the student and click **OK**. If the name matches more than one student, the Student Selection page appears. For more information, see *Student Search*.

Student Record Navigation

- **Previous Record arrow:** When viewing the student pages menu from a selection of students, click the Previous Record arrow to display the student record preceding the selected record. When you reach the first student on the list of selected students, the last student on the list appears.
- **List:** When viewing the student pages menu from a selection of students, click List to display the Student Selection page. For more information, see *Student Search*.
- **Next Record arrow:** When viewing the student pages menu from a selection of students, click the Next Record arrow to display the student record following the selected record. When you reach the last student on the list of selected students, the first student on the list appears.

The remaining items in the student pages menu indicate the possible actions to be performed on the selected record. If a student has transferred out, graduated, is preregistered, or imported into PowerSchool as an historical record, that student's status appears on each student page. The student status is based on the contents of the Enrollment Status field.

Note: The student pages for an active student do not display the student's status indicator.

Several student pages provide alert functions. Use alerts to create and maintain sensitive information for each student. There are four types of alerts: medical, disciplinary, guardian, and general. Enter alert information in the Emergency/Medical, Log Entries, Parent, and Other Information student pages, respectively. If a student's record contains an alert, an alert icon appears at the top of each of his or her student pages. Alert details are available to all users by clicking the alert icon on any student page.

Student Standards Grades Classic View Page

The Standards Grades Classic View page displays the student's standards grades and comments. By default, only classes currently in progress appear.

How to View the Standards Grades Classic View Page

1. On the start page, search for and select a student. For more information, see *Student Search*. The student pages menu displays the selected default view. For more information, see *Personalize*.
2. Click **Quick Lookup**. The Quick Lookup page appears.
3. Click the **Standards Grades** tab. The Standards Grades Classic View page appears. On this page, you can perform any of the following tasks:
    - Click **Show Completed Classes** to view standards grades for completed classes.
    - Click **Hide Completed Classes** to view only the classes for the current term.
    - If a score appears as a link, click to view score comments.
    - Click the name of the standard to view the following details:
        - Teacher
        - Course
        - Standard Name
        - Gradescale
        - Gradescale Description
        - Gradescale Details

    If the student is enrolled in any special programs, the Attendance By Program section of the page displays attendance for any special programs in which the student is enrolled. The special programs must be set to appear on the Quick Lookup page; for more information, see *Special Program Setup*.

Analytics Student View

The Analytics Student View page displays Analytics student data. Click the **Analytics Student View** tab to view Analytics Student data. This tab appears if Analytics is enabled. For more information, see *Enable Analytics*. You can also access this page from the Test Results page.

Note: The data that appears on the page is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

Student Page Views

Most of the pages you work with are the same for all of the schools that use PowerSchool; however, some pages can be modified to meet your school's individual needs. This function is noted in the appropriate sections. If a section does not indicate that a page can be customized for your school, it is a PowerSchool preconfigured page that cannot be modified.

Note: When reading descriptions of the modifiable pages, keep in mind that either the page itself can be modified by your PowerSchool administrator or the data in the fields on the page can be modified by the PowerSchool user. For example, a page might provide fields for only a student's name and phone number. As the user, you can modify the data in those fields if the information is wrong or has changed. However, if you want the page to provide a student's address in addition to a name and phone number, your PowerSchool administrator must modify the page to add the address field.

Each student page view section assumes that you have selected an individual student record. For more information, see *Student Search*.

Information

Access Accounts

Using the student Access Accounts page, you can:

- Enable Parent Access
- Enable Students Access
- Manually Assigns IDs and Password
- Automatically Assign IDs and Password
- Add a New Parent Access Account, now see *Add Contacts*
- Edit an Existing Parent Access Account, now see *Edit Contacts*

For step-by-step procedures, see respective sections.

Note: For more information about setting up access accounts, see *PowerSchool Student and Parent Portal Administration*.

How to Set Up Access Accounts

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. Use the following table to enter information in the Student Account Access fields:

Field	Description
Enable Student Access	Do one of the following: • Select the checkbox to enable student access. When enabled, a student can sign in to the PowerSchool Student and Parent portal. • Deselect the checkbox to disable student access. When disabled, a student can no longer sign in to the PowerSchool Student and Parent portal.
Student Username	Enter the student’s username.

	Note: This field is only applicable if the **Enable Student Access** checkbox is selected. **Note:** This field appears as read-only if Unified Classroom is enabled. For more information, see *Unified Classroom Setup*.
Student Password	Enter the student's password. **Note:** This field is only applicable if the **Enable Student Access** checkbox is selected.
Student LDAP Enabled	If LDAP is configured on your server, select the **Student LDAP Enabled** checkbox to enable or disable LDAP Authentication for an individual student. For more information, see *LDAP*. You can click **LDAP Lookup** to pull data from the LDAP directory. Alternately, you can click **Clear** to release the data. **Note:** Field level security may be used to restrict this information. The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Student Username** (STUDENTS.STUDENT_WEB_ID) and **LDAP Enabled** (STUDENTS.LDAPENABLED). For more information, see *Field Level Security*.
Auto-Assign IDs and Passwords for this Student	Click to automatically assign a student's and all parents/guardians associated to this student a username and password. **Note:** This field is only applicable if the **Enable Student Access** checkbox is selected. **Note:** The **Auto-assign IDs and Passwords for this Student** link only appears if you have field level security full access to all student fields on this page. For more information, see *Field Level Security*.

4. Use the following table to enter information in the Access Keys fields:

Field	**Description**
Enable Parent Access	Do one of the following:

	• Select the checkbox to enable parent access. When enabled, a parent can sign in to the PowerSchool Student and Parent portal. • Deselect the checkbox to disable parent access. When disabled, a parent can no longer sign in to the PowerSchool Student and Parent portal.
Access ID	If the **Enable Parent Access** checkbox is selected, enter the Access ID parents will use to link this student to their accounts.
Access Password	If the **Enable Parent Access** checkbox is selected, enter the Access Password parents will use to link this student to their accounts.

5. Use the following table to enter information in the Parent Access Accounts fields:

Field	Description
Add New Contact	Click to add a new parent access account. For detailed information, see *How to Add a Contact*.
[Contact]	Click to edit an existing parent access account. For detailed information, see *How to Edit a Contact*.

6. Click **Submit**. A confirmation message appears.

Addresses

This student page provides street and mailing addresses. Street addresses are the places where the students actually live, while mailing addresses are the places where the students receive mail. A street address could be 1234 Maple Lane, while a mailing address could be P.O. Box 102.

Note: The information on this page is linked to that on the Demographics pages. If you make a change here, it appears on those pages, and vice versa.

How to Edit Student Addresses

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Addresses** from the student pages menu. The Addresses page appears.
3. Use the following table to enter Home Address information:

Field	Description
Street, Apt/Suite	Enter the street address in the first field, and apartment or suite number in the second field, if any.
City, State, Zip	Enter the city, state, and zip code for the street address.
Geocode	The latitude/longitude pair that represents the geographical location of the home address. This field is read-only and is automatically generated when the address is validated or imported. For more information about geocodes, see *Address Management*.

4. Use the following table to enter Mailing Address information:

Field	Description
Copy From Home Address	If a student's mailing address is the same as their home address, click to duplicate the home address information in to the mailing address fields.
Street, Apt/Suite	Enter the street address in the first field, and apartment or suite number in the second field, if any.
City, State, Zip	Enter the city, state, and zip code for the street address.
Geocode	The latitude/longitude pair that represents the geographical location of the mailing address. This field is read-only and is automatically generated when the address is validated or

	imported. For more information about geocodes, see *Address Management*.

5. Do one of the following:
    - Click **Validate** next to the address for which you want to perform address validation. For detailed information about performing address validation, see *Perform Interactive Address Validation*.
    - Click **Submit**. The Addresses page displays your changes.

Demographics

The Demographics page provides standard information about the selected student. Fields on the Demographics page can be edited by those with proper access.

Note: Any changes you make to the address fields on the Demographics page are also made to the Address page.

When entering students' birthdates, keep in mind that birthday alerts will appear on each student page for one week prior to each student's birthday. For more information, see *How to Display Birthday Alerts*.

How to Modify Student Demographics

Your PowerSchool administrator can modify this page to meet your school's needs.

Note: Since pages may vary between schools, discuss with your system administrator the purpose of the fields on your school's General Demographics page.

Notes: Field level security may be used to restrict phone information. If PHONENUMBER.PHONENUMBERASENTERED or PHONENUMBER.PHONENUMBEREXT is set to view only or no access, then all phone numbers on this page will have that restriction. For more information, see *Field Level Security*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Demographics** from the student pages menu. The General Demographics page appears.
3. Use the following table to edit information in the fields:

Field	Description

Name (Last, First Middle)	Enter the student's name (Last, First Middle). Names that include spaces (such as **Mary Jo**) can be included in any of the three fields. The maximum number of characters and spaces is 50 for the last name field, 50 for the first name field, and 30 for the middle name field.
Home Address	Enter the student's home address. **Note:** For more information, see *Addresses*.
Mailing Address	Enter the student's mailing address. **Note:** For more information, see *Addresses*.
Home Phone	Enter the student's home telephone number.
Age	Enter the student's age.
Aggregate Days of Membership	The total number of days the student has been enrolled.
Area/Neighborhood	The area or neighborhood in which the student lives.
DOB	Enter the student's birth date.
Ethnicity	Indicate whether or not the student is Hispanic or Latino by selecting one of the following options: • **Yes** • **No** • **Decline to Specify** **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.

Race	Indicate the student's race by selecting the appropriate checkboxes. If you do not wish to indicate the student's race, select the **Decline to Specify** checkbox. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*. **Note:** Field level security may be used to restrict this information (STUDENTRACE.RACECD and STUDENTS.FEDRACEDECLINE). For more information, see *Field Level Security*.
Scheduling/Reporting Ethnicity	Specify the student's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.
Father	Enter the student's father's last and first name (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear if other data is stored for this contact on the Contact Details page. If making a correction to the contact's name, choose **Correcting Name** from the pop-up and click **Submit**. This change will be reflected throughout PowerSchool and on any student linked to this contact. If replacing the contact altogether, choose **Replacing Contact** from the pop-up. An alert message appears. Replaced contacts will no longer appear on the page, but they will remain linked to the student. It is recommended that you click **Go to Contacts Page** to make this change from the student's Contacts page where you can view all relevant data, or to permanently remove the contact. Otherwise, click **Submit**. **Note:** Contact data, such as their phone numbers and employer information, moves with them when a contact is replaced. Custom data does not automatically move with the contact. Be

	sure to manually move custom data as needed when replacing a contact.
Father's Day Phone	Enter the student's father's day telephone number.
Father's Employer	Enter the name of the student's father's employer.
Father's Home Phone	Enter the student's father's home telephone number.
Gender	Choose the student's gender from the pop-up menu.
Grade Level	The grade level in which the student is currently enrolled.
Graduation Year	Enter the year in which the student graduates.
Guardianship	Enter the student's guardian's name.
Guardian Email	Enter the student's guardian's email. Separate multiple addresses with commas.
Mother	Enter the student's mother's last and first name (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear. For more information, see **Father** field.
Mother's Day Phone	Enter the student's mother's day telephone number.
Mother's Employer	Enter the name of the student's mother's employer.
Mother's Home Phone	Enter the student's mother's home telephone number.
Previous Student ID	Enter the student's previous ID number.
SSN	Enter the student's Social Security Number.

Student Number	Enter the student's identification number.

4. Click **Submit**. The Changes Recorded page appears, unless Family Management is enabled. Any shared fields that were modified, noted with an "x." When updating linked students, you are updating the information in these fields for those students.
5. On the Students with Shared Family Information page, select the **Update** checkboxes to change the linked student's demographic information to match the modified demographic information of the selected student. For example, if you change the selected student's street address from 12 Maple Way to 1 Apple Drive and the linked student also lives at 12 Maple Way, select the **Update** checkbox to change the linked student's address to 1 Apple Drive.

   Note: To link students belonging to the same family, see *How to Link and Copy Information for Related Students*.

6. Click **Submit**. The General Demographics page appears.

How to Display Birthday Alerts

If a student's birthday is within a week of the current date, a birthday alert appears for him or her on each student page.

1. On the start page, search for and select a student. For more information, see *Student Search*. If the student's birthday is within the next week, the Birthday Alert icon appears at the top of each page for the selected student. If the student's birthday is not within the next week, the icon does not appear.
2. Click the **Birthday Alert** icon to read the alert from any page. The Birthday alert for the selected student appears.
3. Click **Close** to close the Birthday Alert window.

Emergency/Medical

This function provides emergency contact names and numbers, as well as any medical information.

Notes: Field level security may be used to restrict phone information. If PHONENUMBER.PHONENUMBERASENTERED or PHONENUMBER.PHONENUMBEREXT is set to view only or no access, then all phone numbers on this page will have that restriction. For more information, see *Field Level Security*.

How to Edit Student Emergency/Medical Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Emergency/Medical** from the student pages menu. The Emergency Contact/Medical page appears.
3. Use the following table to enter information in the fields:

Field	Description
Contact #1 Name	Enter the name of the first contact (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear if other data is stored for this contact on the Contact Details page. If making a correction to the contact's name, choose **Correcting Name** from the pop-up and click **Submit**. This change will be reflected throughout PowerSchool and on any student linked to this contact. If replacing the contact altogether, choose **Replacing Contact** from the pop-up. An alert message appears. Replaced contacts will no longer appear on the page, but they will remain linked to the student. It is recommended that you click **Go to Contacts Page** to make this change from the student's Contacts page where you can view all relevant data, or to permanently remove the contact. Otherwise, click **Submit**. **Note:** Contact data, such as their phone numbers and employer information, moves with them when a contact is replaced. Custom data does not automatically move with the contact. Be sure to manually move custom data as needed when replacing a contact.
Relationship	Choose the relationship of the contact from the pop-up menu.
Phone	Enter the contact's phone number.
Phone Type	Choose the type of phone number from the pop-up menu.
Contact #2 Name	Enter the name of the second contact (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear. For more information, see **Contact #1 Name** field.

Relationship	Choose the relationship of the contact from the pop-up menu.
Phone	Enter the contact's phone number.
Phone Type	Choose the type of phone number from the pop-up menu.
Contact #3 Name	Enter the name of the third contact (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear. For more information, see **Contact #1 Name** field.
Relationship	Choose the relationship of the contact from the pop-up menu.
Phone	Enter the contact's phone number.
Phone Type	Choose the type of phone number from the pop-up menu.
Doctor	Enter the name and phone number for the student's doctor.
Dentist	Enter the name and phone number for the student's dentist.
Special Medical Considerations	Enter any medical considerations for the student, such as previous conditions.
Allergies	Enter any of the student's allergies to food or medicines.
Immunizations	Enter the dates of the student's vaccinations using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If you do not use this format, an alert appears.
Medical alert Text	Enter any medical information that needs to be brought to staff members' attention. For more information, see *How to Add a Medical Alert*.

Alert Expires	Enter the expiration date of the Medical alert, if applicable, using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If there is no expiration date, either do not enter a date or use the default entry 0/0/0. For more information, see *How to Add a Medical Alert*.

4. Click **Submit**. The Changes Recorded page appears.

How to Add a Medical Alert

Use a Medical alert to indicate and make staff members aware of a student's medical condition.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Emergency/Medical** from the student pages menu. The Emergency Contact/Medical page appears.
3. Use the following table to enter information in the fields:

Field	Description
Medical alert Text	Enter any medical information that needs to be brought to staff members' attention. For more information, see *How to Add a Medical Alert*.
Alert Expires	Enter the expiration date of the Medical alert, if applicable, using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If there is no expiration date, use the default entry 0/0/0. For more information, see *How to Add a Medical Alert*.

4. Click **Submit**. The Medical Alert icon appears at the top of each page for the selected student. If the student does not have a Medical alert, the icon does not appear.
5. Click the Medical Alert icon to read the alert from any page. The Medical alert for the selected student appears.

6. Click **Close** to close the Medical Alert window.

Family

The Family function provides the names, grades, and schools of students who are related to the selected student. Use this page to link and copy information between related students or to unrelate students who are incorrectly identified as members of the same family.

How to Link and Copy Information for Related Students

Relate students who have similar demographic information and copy that information to the selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Family** from the student pages menu. The Students with Shared Family Information page appears. If no other students are linked to this student, you can search for other family members.
3. Click **Search for Additional Family Members**. The Search for Additional Family Members page appears.
4. Use the following table to enter information in the fields:

Field	Description
Family ID	Enter the family ID, if applicable. **Note**: This field is provided only for districts and schools that used it previously to associate related students. Family management functionality is based upon relationships stored in the Relationships table.
Mother's Name	Enter the name of the mother to include in the search.
Father's Name	Enter the name of the father to include in the search.
Phone	Enter the telephone number to include in the search.
Guardian's Name	Enter the name of the guardian to include in the search.

Address (Street, City)	Enter an address to include in the search.
Sibling's Name (Last, First)	Enter the name of a sibling who is also a student within the district. There are two separate fields since a student's name is stored as unique fields for last name and first name.
Include Student's Last Name in Search	Select the checkbox to include the last name of the current student in the family match search. All students who share the same last name will be included in the search results.

5. Click **Submit**. Unless no similar students are found, the Family Search Results page displays the students that match the search criteria.

   Note: An "x" appears in the fields that match the search criteria entered on the Search for Additional Family Members page.

6. Click **Copy** above the student from which you want to copy demographic information.
7. Select the **Related** checkbox for any students related to the selected student.

   Note: If you select the option to copy the student's information, the **Related** checkbox is selected automatically.

8. Click **Submit**. The Search for Additional Family Members page displays once again.

   Note: Some contacts may have data that cannot be viewed on the student Parents, Emergency/Medical or Demographics pages. Their original contact type will be removed, but these contacts will remain associated with the student. If necessary, the contact can be permanently removed from the student Contacts page. For more information, see *View Contacts Associated to a Student*.

How to Unrelate Students

Remove the relationship between students who have been linked to the same family. For more information, see *How to Link and Copy Information for Related Students*.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Information, choose **Family** from the student pages menu. The Students with Shared Family Information page appears.
3. Select the **Remove from Family** checkbox.
4. Click **Submit**. The Changes Recorded page appears.

Modify Info

This page displays a variety of information about students, much of which is shared with the Demographics page. Note that this page is school-specific, and the fields on your school's Modify Info page can vary. Talk to your PowerSchool administrator about adding fields to or deleting fields from your school's page.

How to Modify Student Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Modify Info** from the student pages menu. The Modify Information page appears.
3. Edit the information as needed.

   Note: The **Tracker** field is used for state reporting purposes. For state-specific information, see your PowerSchool state reporting documentation available on PowerSource. If your state is not listed, documentation and/or functionality does not currently exist for that state.

4. Click **Auto-assign IDs for this student** to assign lunch and phone IDs.
5. Click **Submit**. The Modify Information page displays the changes.

Other Information

This page is state-specific and can be modified to your school's specifications. Many schools modify the Other Information page to meet their needs.

How to Edit Other Student Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Other Information** from the student pages menu. The Other Information page appears.
3. Edit the information as needed.

Note: For information about the **Fee Exemption Status** pop-up menu, see *How to Assign Fee Exemption Status to an Individual Student*.

4. Click **Submit**. The Other Information page displays the changes.

How to Add Other Alerts

Use an Other alert to make the staff members aware of any general information related to a student. For more information about other types of alerts, see *Balance Alert*, *How to Add a Medical Alert*, *How to Display Birthday Alerts*, *How to Add a Discipline Alert*, and *How to Add Guardian Alerts*.

Note: Field level security may be used to restrict this information (STUDENTS.ALERT_OTHER and STUDENTS.ALERT_OTHEREXPIRES). For more information, see *Field Level Security*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Other Information** from the student pages menu. The Other Information page appears.
3. Use the following table to enter information in the fields:

Field	Description
Other Alert Text	Enter any general information that needs to be brought to staff members' attention.
Alert Expires	Enter the expiration date of the alert, if applicable, using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If there is no expiration date, use the default entry 0/0/0.

4. Click **Submit**. The Other Alert icon appears at the top of each page for the selected student. If the student does not have an Other alert, the icon does not appear.
5. Click the **Other Alert** icon to read the alert from any page. The Other alert for the selected student appears.
6. Click **Close** to close the Other Alert window.

Parents

This function provides the names, addresses, and phone numbers of parents or guardians. The information on this page is the same as on the Emergency and Modify Info pages. Any entries or changes made to the Parent page appear on these other pages and vice versa.

Note: Enter names in the last, first format. This is important for reporting purposes.

How to Edit Parent/Guardian Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Parents** from the student pages menu. The Parents page appears.
3. Use the following table to enter information in the Parent Information section:

Field	Description
Mother's Name	Enter the student's mother's last and first name (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear if other data is stored for this contact on the Contact Details page. If making a correction to the contact's name, choose **Correcting Name** from the pop-up and click **Submit**. This change will be reflected throughout PowerSchool and on any student linked to this contact. If replacing the contact altogether, choose **Replacing Contact** from the pop-up. An alert message appears. Replaced contacts will no longer appear on the page, but they will remain linked to the student. It is recommended that you click **Go to Contacts Page** to make this change from the student's Contacts page where you can view all relevant data, or to permanently remove the contact. Otherwise, click **Submit**. **Note:** When replacing a contact, the contact's data, such as their phone numbers and employment information, is retained and moves with them. Custom data does not automatically move with the contact. Be sure to manually move custom data as needed when replacing a contact.
Daytime Phone	Enter the mother's telephone number.

Father's Name	Enter the student's father's last and first name (Last, First). If you edit this field, the **Reason for Name Change** pop-up may appear. For more information, see **Mother's Name** field.
Daytime Phone	Enter the father's telephone number.

4. Use the following table to enter information in the Guardian Name & Info section:

Field	**Description**
Last, First, Middle	Enter the student's guardian's name (Last First Middle). If you edit any of these fields, the **Reason for Name Change** pop-up may appear. For more information, see **Mother's Name** field
Daytime Phone	Enter the guardian's telephone number.
Relationship Code	Enter the code that describes the relationship between the student and the guardian.
Previous Guardian Info	Enter any information about previous guardians for this student.
Single Parent Household	Select either **True** or **False** to indicate if the student lives in a single parent household.

5. Use the following table to enter information in the Guardian Email section:

Field	**Description**
Guardian's Email Address	Enter the student's guardian's email. Separate multiple addresses with commas. **Note:** If the parent has established a parent account, the email address that they used to establish the account appears.

6. Use the following table to enter information in the Guardian Alert section:

Field	Description
Guardian Alert Text	To send a notification to the parent, enter the desired text.
Alert Expires (Date)	To discontinue the notification after a certain date, enter the desired date.

Note: For information about Guardian Alerts, see *How to Add Guardian Alerts*.

7. Click **Submit**. The Parent page displays the changes.

How to Add Guardian Alerts

Use a Guardian alert to indicate and make the staff members aware of a student's guardian information.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Parents** from the student pages menu. The Parents page appears.
3. Use the following table to enter information in the fields:

Field	Description
Guardian Alert Text	Enter any guardian-related information that needs to be brought to staff members' attention.
Alert Expires	Enter the expiration date of the guardian alert, if applicable, using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If there is no expiration date, use the default entry 0/0/0.

4. Click **Submit**. The Guardian Alert icon appears at the top of each page for the selected student. If the student does not have a Guardian alert, the icon does not appear.

5. Click the **Guardian Alert** icon to read the alert from any page. The Guardian alert for the selected student appears.
6. Click **Close** to close the Guardian Alert window.

Photo

This function displays a picture of the selected student, if one is available. In addition, a photo appears next to the student's name at the top of each student page. Click the photo to view a larger version of the photo.

To configure your system to display student photos, contact your PowerSchool administrator.

The picture files must be in .JPG format. Some school photographers provide a CD-ROM of the annual student pictures in JPG format, which your PowerSchool administrator can then import into PowerSchool. Contact your PowerSchool administrator to import many photos from another system, a CD-ROM, or other media.

How to Submit a Student Photo

Use this procedure to submit a new student photo, even if there is already a photo for the student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Photo** from the student pages menu. The Student Photo page appears. If a photo is available, it appears in the center of the page.
3. Click **Submit a New Photo for this Student** to change or add a photo. The Submit Photo page appears.
4. Click **Choose File**. The Open dialog appears.
5. Locate and double-click the file. The Submit Photo page displays the file name.
6. Click **Submit**. The Student Photo page displays the student's photo.

   Note: If the old photo still appears or if there is no photo at all, click the Web browser's **Refresh** or **Reload** button.

How to Delete a Student Photo

Use this procedure to delete student photo.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Information, choose **Photo** from the student pages menu. The Student Photo page appears.
3. Click **Delete**.
4. Click **Confirm Delete Photo**. The Student Photo page no longer displays the student's photo.

State/Province

This function is state-specific or province-specific and can be modified to meet the needs of schools in different states and provinces. Contact your PowerSchool administrator to add or delete fields. Your permissions determine if you can edit the data in the fields.

How to Edit State/Province Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **State/Province** from the student pages menu. The information page for your state or province appears.
3. Edit the information as needed.
4. Click **Submit**. The Changes Recorded page appears
5. Click **Back** to return to the information page for your state or province.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

Student Email

To provide teachers using PowerTeacher Gradebook with the ability to communicate with the student via email, enter the student's email address on the Email Configuration page. Once configured, the student's email address appears on the Student Detail Window in PowerTeacher Gradebook.

How to Configure Student Email

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Student Email** from the student pages menu. The Email Configuration page appears.
3. Enter the student's email address in the **Student Email Address** field. Only one email address may be entered.
4. Click **Submit**. The Email Configuration page displays the changes.

Transportation

This page displays transportation-related information for the selected student. You can add, edit, or delete transportation information from the Transportation Entry student page.

How to View Transportation Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Transportation** from the student pages menu. The Transportation page displays the student's means of transportation.

How to Add Transportation Information

Add transportation information for the selected student to indicate the means of transporting this student either to or from school. Repeat the procedure to enter transportation for the reverse direction or to enter a complex transportation schedule, such as different means of transportation for different days of the week.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Transportation** from the student pages menu. The Transportation page appears.
3. Click **New**. The New Transportation Entry page appears.
4. Use the following table to enter information in the fields:

Field	Description
Student	This is the selected student's name.
Start Date	Enter the date that the student will begin using this form of transportation using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
End Date	Enter the date that the student will stop using this form of transportation using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the

	date with an incorrect format, the date field is submitted as a blank entry.
From/To School	Select either **From School** or **To School** to indicate the direction of transportation for this entry.
Description	Enter a description for the entry, such as **Walks to School**. This description appears on the Student Transportation Entries page.
Days Of The Week	Select the checkboxes to indicate the days of the week that the student uses this form of transportation.
Transportation Type	Choose from the pop-up menu the means of transportation, such as **Walks**.
Route Number	Enter a route number if the student uses transportation provided by the school.
Bus Number	Enter the bus number if the student uses transportation provided by the school.
Driver Name	Enter the bus driver's name if the student uses transportation provided by the school.
Bus Contact Number	Enter the driver's radio number or mobile telephone number.
Departure Time	Enter the time the transportation begins using the format HH:MM. Enter either **AM** or **PM** after the departure time.
Stop Number	Enter a bus stop number if the student uses transportation provided by the school.
Address	Enter the street address where the student begins the method of transportation.

Route Distance	Enter the distance that the student travels on the way to or from school. Choose either **Miles** or **Kilometers** from the pop-up menu.
Arrival Time	Enter the time the student arrives at the destination using the format HH:MM. Enter either **AM** or **PM** after the arrival time.
Special Instructions	Enter any special instructions or notes related to the student's transportation.
Linking Indicator	Choose the linking indicator from the pop-up menu (optional). Use the indicator to link bus routes that share commonalities. For example, you can link a student's AM and PM bus route for reporting purposes.

5. Click **Submit**. The Changes Recorded page appears.

How to Edit Transportation Information

Edit transportation information for the selected student to indicate the means of transporting this student either to or from school.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Transportation** from the student pages menu. The Transportation page appears.
3. Click the name of the entry you want to edit. The Edit Transportation Entry page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Transportation Information*.
5. Click **Submit**. The Changes Recorded page appears.

How to Delete Transportation Information

Delete transportation information that is no longer relevant for the selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Information, choose **Transportation** from the student pages menu. The Transportation page appears.
3. Click the name of the entry you want to delete. The Edit Transportation Entry page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Academics

Meeting/Interval Attendance

In PowerSchool, your school can track meeting attendance, interval attendance, daily attendance, and time attendance. Students' meeting and interval attendance records indicate their absences and tardies in each class period during the school day. Interval attendance allows for multiple attendance records per period. Students' daily attendance records indicate their absences, tardies, and arrival and dismissal times for an entire school day. Time attendance is a simple way of adding attendance value by entering total minutes or hours for a given day.

Use the Meeting/Interval Attendance function to view or change a student's attendance record. Each column represents one week, with the days of the week MTWTF) underlined. Attendance codes are noted in the chart under each day. In the case of meeting attendance, the days without a code indicate that the student was present. With interval attendance, all days and periods must have a code.

Meeting and interval attendance functions share the same page. The primary difference between the two is that meeting allows for only one attendance record per period while interval attendance allows for multiple attendance records per period based on the specified interval. Whether the class is meeting or interval is determined by what is specified for the section in the *Section Setup* page. Interval attendance may not appear any different from meeting attendance if the period length is less than or equal to the specified interval duration defined in *Attendance Preferences*. For more information about attendance, see *Attendance Overview*.

Enable Enter Attendance Link on Student Pages Menu

A shortcut to the Edit Meeting/Interval Attendance page is available via the Enter Attendance link, which appears just below the Attendance link. To enable the Enter Attendance link to appear in the student pages menu, **Meeting** or **Interval** must be selected as one of the attendance recording methods and set as the default attendance recording page on the *Attendance Preferences* page.

How to Take Meeting or Interval Attendance for a Single Day/Period

Use this procedure to take Meeting or Interval attendance for the selected student. You can mark or change a single attendance instance in a selected week.

Note: Any change recorded for meeting attendance modifies daily attendance if daily attendance is enabled and the period associated with the meeting attendance being modified is the bridge period for that day. Interval attendance never modifies daily attendance.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page appears, based on the Default Attendance Recording Page setting on the Attendance Preferences page.

   Note: To go directly to the Edit Meeting/Interval Attendance page, click **Enter Attendance** instead of **Attendance**. The Edit Meeting/Interval Attendance page appears. To continue, skip to Step 6.

3. If the Meeting/Interval Attendance page does not display by default, click **Meeting/Interval**. The Meeting/Interval Attendance page appears.

   Note: A dash (-) indicates that school is not in session and/or the student is not enrolled on that date.

4. Click **Show dropped classes also** to view or change attendance records for dropped classes. The dropped classes appear on the page with the other classes.
5. Click the week link in a week that you want to enter or change attendance. The Edit Meeting/Interval Attendance page appears.

   Note: The Submit button is unavailable until Step 7 is performed.

6. Use the following table to enter information in the fields:

Field	Description
Current attendance code	Choose the attendance code you want to enter.
Set All	Click to enter the selected attendance code in all periods and/or intervals fields for a given day.
[Attendance]	Click to enter the selected attendance code in a specific period and/or interval field.

[Comment Icon]	When an attendance code (other than blank) is entered, a gray Comment icon appears. To enter an attendance comment: 1. Click the **Comment** icon. The Edit Comments pop-up appears. 2. Enter a comment for the student's attendance record. 3. Click **OK**. The Comment icon now appears blue to indicate a comment has been entered.

7. Click **Submit**. The Changes Recorded page appears.

How to Take Meeting Attendance for an Extended Day/Period

Note: This function does not function with interval attendance.

Use this procedure to take meeting attendance for the select student. You can mark or change a student's attendance records for blocks of time. This is particularly useful when the student has been or will be out for an extended period. To change a student's attendance record for an extended period, it is easiest to use this method.

Note: Any change recorded for meeting attendance modifies daily attendance if the following conditions are met: daily attendance is enabled and the period associated with the meeting attendance being modified is the bridge period for that day.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page appears, based on the Default Attendance Recording Page setting on the Attendance Preferences page.

   Note: To go directly to the Edit Meeting Attendance page, click **Enter Attendance** instead of Attendance. The Edit Meeting Attendance page appears. To continue, skip to Step 6.

3. If the Meeting Attendance page does not display by default, click **Meeting**. The Meeting Attendance page appears.

   Note: A dash (-) indicates that school is not in session and/or the student is not enrolled on that date.

4. Click **Show dropped classes also** to view or change attendance records for dropped classes. The dropped classes appear on the page with the other classes.
5. Click **Change Meeting Attendance**. The Change Meeting Attendance page appears.
6. Use the following table to enter information in the fields:

Field	Description
Change attendance for	The selected students appear.
From this date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Meetings to scan	Select the checkboxes to indicate the periods to change. To mark attendance for the entire day, click **Select All**.
Codes to scan for	Either choose all by clicking **All** or select **These Codes** and then choose the attendance codes for which you want to scan
Attendance code to set	Choose the attendance code to apply to the date range from the pop-up menu.
If other than a default present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record.

7. Click **Submit**. The Changes Recorded page appears.

Daily Attendance

In PowerSchool, your school can track both meeting and daily attendance. Students' meeting attendance records indicate their absences and tardies in each class period during the school day. Students' daily attendance records indicate their absences, tardies, and arrival and dismissal times for an entire school day.

Use the Daily Attendance function to view or change a student's attendance record. Each column represents one week, with the days of the week (MTWTF) underlined. Attendance codes are noted in the chart under each day. On the days where there is no code, the student was present.

For more information about attendance, see *Attendance Overview*.

How to Take Daily Attendance for an Individual Student

Schools use the Daily Attendance function to select a single period to denote a student's daily attendance. By denoting the period, default times for check-in, checkout, and return-in can be defined for a daily attendance total. Attendance can be entered from the classroom using PowerTeacher. Once the teacher enters the attendance, the office staff can then take control of a student's daily attendance. The office also can use a variety of options and reports when working with the Daily Attendance function.

With a period marked for daily attendance, the teacher automatically sets the daily attendance while taking attendance in the classroom using PowerTeacher. Your PowerSchool administrator sets the defaults for the time in and time out. This lets teachers not only track classroom attendance, but also set the initial code for the office.

After you add a daily attendance entry, you can modify daily attendance. Click the abbreviation for the first day above each day of the week in the current term. Click the letter to display the Daily Attendance page for the date to be modified.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.
3. Click **Daily**. The Daily Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click the link in a week where you want to enter attendance codes. The New Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Date	The date for which you are taking attendance appears.
Attendance Code	Choose the attendance code from the pop-up menu.
Total Time	Based on the times entered, PowerSchool calculates the minutes the student has attended for the day. The results display after you click **Submit**.
Comment	Enter any additional text, if applicable.
Time In	Enter the time the student arrives, if applicable.
Time Out	Enter the time the student leaves, if applicable.
Exclude from Total Time Calculation	Select the checkbox to exclude this time item from the total time calculation.
Time Comment	Enter any additional text regarding the time the student arrived or left, if applicable.

6. Click **Submit**. The Changes Recorded page appears.

   Note: A clock icon, total minutes, attendance code, and time in and time out appear in the date for which you just took attendance.

How to Take Daily Attendance for Multiple Days for an Individual Student

In addition to changing a single date for an individual student, you can change multiple dates at one time.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.

3. Click **Daily**. The Daily Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click **Change Multiple Days** at the top of the Daily Attendance page. The Change Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Change Daily Attendance for	The selected student appears.
From this Date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this Date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Codes to scan for	Select the attendance codes for which you want to scan. To select multiple attendance codes, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each of the attendance codes you want to scan.
Attendance Code to Set	Choose the attendance code to apply to the date range from the pop-up menu.
If Other Than a Default Present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record, if applicable.

6. Click **Submit**. The Changes Recorded page appears.

   Note: A clock icon, total minutes, attendance code, and time in and time out appear in the date for which you just took attendance.

How to Edit Daily Attendance

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Attendance** from the student pages menu. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.
3. Click **Daily**. The Daily Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click the link in a week where you want to change attendance codes. The Edit Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Date	The date for which you are taking attendance appears.
Attendance Code	Choose the attendance code from the pop-up menu.
Total Time	Based on the times entered, PowerSchool calculates the minutes the student has attended for the day. The results display after you click **Submit**.
Comment	Enter any additional text.
Time In	The time the student arrives appears.
Time Out	The time the student leaves appears.

Minutes	Based on the times entered, the minutes the student has attended for each class appears, as well as the total minutes the student has attended for the day.
Comment	Any additional text regarding the time the student arrived or left appears.
Exclude from Total Time Calculation	Indicates whether or not this time item is excluded from the total time calculation.

6. Click **Submit**. The Changes Recorded page appears.

   Note: A clock icon, total minutes, attendance code, and time in and time out appear in the date for which you just took attendance.

Record Meeting Attendance by Section

Using the Record Meeting Attendance [Section] page, you can enter or change the attendance records for students in a section.

How to Record Meeting Attendance by Section for a Date Range

Once an attendance record has been entered or modified by a PowerSchool administrator, it cannot be modified by the teacher in PowerTeacher.

1. To access the Record Meeting Attendance [Section] page, do one of the following:
   - Access the Sections page. For more information, see *Sections*.
   - Access the Teacher Schedule page. For more information, see *Staff Current Schedules*.
2. Click the **Attendance** (grid) icon next to the class for which you want to record attendance.
3. Use the following table to enter information in the fields:

Field	**Description**
Attendance Code	Select the attendance code from the pop-up menu.

	Note: To enter attendance all students using the day of the week buttons, an attendance code other than blank (Present) must be selected.
Date Range	1. Click **Edit**. The Update Date Range pop-up appears. 2. Do one of the following: • Select **Range**, enter the date range for which you want to enter attendance, or click the **Calenda**r icon to select a date. • Select **Reporting Term** to choose the term from the pop-up menu. 3. Click **Update** to change the attendance date.
Comments	Do one of the following: • Click **Display** to show teacher comments in the attendance grid. • Click **Hide** to not show teacher comments in the attendance grid.

4. To enter an attendance code for all students, click the day of the week (S, M, T, W, T, F, S) for which you want to enter the attendance code.

   Note: Attendance codes that have already been entered are not overwritten. However, if the attendance code is a blank (Present), it will be overwritten.

5. Use one of the following methods to enter the applicable attendance code:
   - Click in the field next to the student's name to enter the attendance code you selected from the **Attendance Code** pop-up menu. Use the pop-up menu to select a different attendance code, if needed.
   - Double-click in a field and select the code from the pop-up menu. Use the arrow keys on your keyboard to scroll through the list.
   - Click in a field and type the attendance code directly in the field.

   Note: Use the Tab or arrow keys to navigate to a different field.

6. When an attendance code is entered, a comment icon appears. Click the icon to enter an attendance comment on the Edit Comments pop-up. Click **OK** to enter the comment for the student's attendance record.

7. Click on an icon in the **Alert** column to view the applicable alert pop-up.
8. When finished entering attendance and comments, click **Submit**.

How to Record Meeting Attendance by Section for a Specific Date

Recording meeting attendance by section for a specific date is the same in PowerSchool as when entering single day attendance in PowerTeacher. Once an attendance record has been entered or modified by a PowerSchool administrator, it cannot be modified by the teacher in PowerTeacher.

Note: By submitting attendance on this page you are verifying that attendance has been taken for this entire class.

1. To access the Record Meeting Attendance [Section] page, do one of the following:
    - Access the Sections page. For more information, see *Sections*.
    - Access the Teacher Schedule page. For more information, see *Staff Current Schedules*.
2. Click the **Attendance** (chair) icon.
3. Use the following table to enter information in the fields:

Field	**Description**
Attendance Code	Select the attendance code from the pop-up menu. **Note:** Blank attendance codes count as (Present). However, if using interval attendance, an attendance value may be required to be entered for each student based on the requirements for your state/province. **Note**: If entering interval attendance, the interval for the selected period appears at the top of the **Attendance** column.
Date	Select the date or period for which you want to enter attendance from the pop-up menu. **Note**: If entering interval attendance, the interval for the selected period appears at the top of the **Attendance** column.
Classes	If there is more than one section of this class, you can click **Show Multiple Sections** to combine the students from multiple sections of this class into one attendance view. Click **Show Single Section** to return to a single section view. For more information,

	see *How to Record Meeting Attendance for Multiple Sections for a Specific Date*.

4. Use one of the following methods to enter the applicable attendance code:
    - Click in the field next to the student's name to enter the attendance code you selected from the **Attendance Code** pop-up menu. Use the pop-up menu to select a different attendance code, if needed.
    - Double-click in a field and select the code from the pop-up menu. Use the arrow keys on your keyboard to scroll through the list.
    - Click in a field and type the attendance code directly in the field.

    Note: Use the Tab or arrow keys to navigate to a different field.

5. When an attendance code is entered, a comment icon appears. Click the icon to enter an attendance comment on the Edit Comments pop-up. Click **OK** to enter the comment for the student's attendance record.
6. Click on an icon in the **Alert** column to view the applicable alert pop-up.
7. When finished entering attendance and comments, click **Submit**.

How to Record Meeting Attendance for Multiple Sections for a Specific Date

Recording meeting attendance for multiple sections for a specific date is the same in PowerSchool as when recording attendance for multiple sections in PowerTeacher. Once an attendance record has been entered or modified by a PowerSchool administrator, it cannot be modified by the teacher in PowerTeacher.

Note: By submitting attendance on this page you are verifying that attendance has been taken for this entire class.

1. To access the Record Meeting Attendance [Section] page, do one of the following:
    - Access the Sections page. For more information, see *Sections*.
    - Access the Teacher Schedule page. For more information, see *Staff Current Schedules*.
2. Click the **Attendance** (chair) icon.
3. Click **Show Multiple Sections**. In Single Day attendance mode, the names of those sections that meet concurrently appear, along with a combined class roster. In Multi-Day attendance mode, the names of those sections that meet concurrently appear, and the students display by section.

    Note: Concurrent attendance can only be taken for sections that share the same attendance mode as the originally selected section. For instance, if the selected section is designated as an interval attendance mode, only sections that are designated as using interval attendance will be combined when **Show Multiple Sections** is selected.

4. Enter the attendance code using the data entry options for the selected page.

   Note: Blank attendance codes count as (Present). However, if using interval attendance, an attendance value may be required to be entered for each student based on the requirements for your state/province.

5. Repeat for each different attendance code to assign.
6. Click **Submit**. The attendance codes are saved to the PowerSchool system.

Time Attendance

In PowerSchool, your school can track meeting attendance, interval attendance, daily attendance and time attendance. Students' meeting and interval attendance records indicate their absences and tardies in each class period during the school day. Interval attendance allows for multiple attendance records per period. Students' daily attendance records indicate their absences, tardies, and arrival and dismissal times for an entire school day.

Time attendance is a simple way of adding attendance value by entering total minutes or hours for a given day. It is often used to enter work experience hours off of a timecard from a student's vocational job or for entering independent study hours.

Use the Time Attendance function to view or change a student's time attendance record. Each column represents one week, with the days of the week (MTWTF). Attendance minutes are noted in the chart under each day.

For more information about attendance, see *Attendance Overview*.

How to Take Time Attendance

After you add a time attendance entry, you can modify the entry by clicking the minutes in the appropriate day column. Multiple time attendance entries can be made for a single day by clicking the day abbreviation. Each time the day abbreviation is clicked a new entry is displayed to be filled out. Time entries cannot be deleted but they can be given a zero minute (or hour) amount that effectively voids them.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Attendance** from the student pages menu. The attendance pages appear. The default attendance page that appears depends on the Default Attendance Recording Page setting on the Attendance Preferences page.
3. Click **Time**. The Time Attendance page appears.

   Note: A dash (-) appears to indicate that school is not in session and/or the student is not enrolled on that date.

4. Click the day abbreviation in a week where you want to enter or change attendance. The New Time Attendance page appears.
5. Use the following table to enter information in the fields:

Field	Description
Date	The date for which you are taking attendance appears (read-only).
Attendance Code	Choose the attendance code from the pop-up menu.
Time	Enter the total amount of attendance time for this record. The value can either be entered in minutes or hours.
Minutes/Hours	Let the system know whether the time value entered is in minutes or hours. The default is minutes. If the time value entered is in hours then select hours from the pop-up menu. The system will convert the value to minutes when it is stored. Hours are not stored with the record.
Program	If these hours are associated to a special program that the student is enrolled in then specify that there. For example, California's Alternative Education program for Continuation Education requires that attendance is tracked for the program. The valid values are any of the special programs that the student is currently enrolled in.
Work Experience	This is primarily targeted for use for California Continuation Education, which requires that the attendance hours related to work time are tracked.

Comment	Enter any additional text regarding this record.

6. Click **Submit**. The Changes Recorded page appears.

Cumulative Info

Cumulative Info is a view-only page that displays cumulative grades for the currently selected term. The information is derived from data access tags entered in the GPA Student Screens. For more information, see *GPA Student Screens*.

How to View Student Cumulative Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Cumulative Info** from the student pages menu. The Cumulative Information page appears.

   Note: This page is view-only for all users.

Once graduation planner is set up, you can then begin working with students managing graduation plans and generating graduation progress summaries.

Graduation Plans

Using the Graduation Plan Selection page, you can manage graduation plans for individual students.

How to Select a Graduation Plan

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Selection** from the student pages menu. The Graduation Plan Selection page appears.
3. Use the following table to enter information in the fields:

Field	Description
Year Entering Graduation Plan	Enter the year the student will begin the graduation plan.

	Note: This setting affects the default version the student will be assigned if the name is selected instead of a specific version.
Graduation Contracts	In the list box on the left, click the name or the specific version of the graduation contract you want to select. The selected graduation contract appears in the list box on the right. To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button. If selecting multiple graduation contracts, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page. **Note:** If the name is selected instead of a specific version, the student will be assigned the version of the plan, which matches their **Year Entering Graduation Plan** setting.
Year Entering Post-Secondary School	Enter the year the student will go to the post-secondary school. **Note:** This setting affects the default version the student will be assigned if the name is selected instead of a specific version.
Post-Secondary Preparation Plans	In the list box on the left, click the name or the specific version of the post-secondary preparation plan you want to select. The selected post-secondary preparation plan appears in the list box on the right. To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button. If selecting multiple post-secondary preparation plans, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page.

	Note: If the name is selected instead of a specific version, the student will be assigned the version of the plan, which matches their **Year Entering Post-Secondary Preparation Plans** setting.

4. Click **Submit**. The Graduation Plan Progress page appears.

How to Edit a Graduation Plan Selection

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Selection** from the student pages menu. The Graduation Plan Selection page appears.
3. Edit the information as needed. For field descriptions, see *How to Select a Graduation Plan*.
4. Click **Submit**. The Graduation Plan Progress page appears.

How to Remove a Graduation Plan

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Selection** from the student pages menu. The Graduation Plan Selection page appears.
3. Use the following table to enter information in the fields:

Field	Description
Graduation Contracts	To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button.
Post-Secondary Preparation Plans	To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button.

4. Click **Submit**. The Graduation Plan Progress page appears.

Graduation Plan Progress

Note: This procedure may also be performed via **Start Page > PowerScheduler > Selected Students > Graduation Plan Progress**.

How to View a Student's Graduation Plan Progress

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page displays the following information for each plan:

Field	Description
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens. 2. Review information. 3. Click **Close**.
Required Tests	
Test Name	The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc. Click to view detailed information.
Action	If the **Allow Waiver** checkbox on the Edit Graduation Plan Test Requirements page has been enabled, you can waive the required test. To add a waiver to a required test, see *How to Add a Required Test Waiver*. To edit a waiver for a required test, see *How to Edit a Required Test Waiver*.

	To delete a waiver from a required test, see *How to Delete a Required Test Waiver*.
Attempts	The number of times the student has taken the required test.
Completed	Indicates whether the student has passed, failed, waived, or has not taken the required test.
Subjects Groups	
Subject Group	The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information: 1. Click the name of a subject group. The [Subject Group] drawer opens. 2. Review information. 3. Click **Close**.
[Waiver]	If the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled for a subject group, you can waive graduation requirements for students within the subject group. To add a waiver to a subject group, see *How to Add a Subject Group Waiver*. To edit a waiver for a subject group, see *How to Edit a Subject Group Waiver*. To delete a waiver from a subject group, see *How to Delete a Subject Group Waiver*.
Earned	The total number (and individual number) of credits for courses within the subject group that the student has earned.
Enrolled	The total number of courses within the subject group that the student is currently enrolled in.

Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.
Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: • Dark green indicates completed credits. • Green indicates current enrollments. • Blue indicates waived credits. • Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

How to Add a Required Test Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Required Tests section, click the **Plus (+)** button next to the required test for which you want to add a waiver. The Add Waiver drawer opens.
4. Use the following table to enter information in the fields:

Field	**Description**
Test Name	The name of a required test.

Waiver Type	Choose a waiver type from the pop-up menu.
Waiver Reason	Choose a waiver reason from the pop-up menu.
Waiver Source	Choose a waiver source from the pop-up menu.
Waiver Date	Indicate the date the waiver is effective.
Authorized By	Choose the name of the person authorizing the waiver from the pop-up menu.

5. Click **Submit**. The Add Waiver drawer closes.

How to Edit a Required Test Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Required Tests section, click the **Pencil** icon next to the required test for which you want to edit a waiver. The Edit Waiver drawer opens.
4. Edit as needed. For detailed field descriptions, see *How to Add a Required Test Waiver*.
5. Click **Submit**. The Edit Waiver drawer closes.

How to Delete a Required Test Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Required Tests section, click the **Pencil** icon next to the required test for which you want to delete a waiver. The Edit Waiver drawer opens.
4. Click **Delete**.
5. Click **Confirm Delete**. The Edit Waiver drawer closes.

How to Add a Subject Group Waiver

The Graduation Progress page displays the student's four-year graduation plan, any post-secondary plans, and the progress of each of those plans.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Subject Groups section, click the **Plus (+)** button next to the subject group for which you want to add a waiver. The Add Waiver drawer opens.
4. Use the following table to enter information in the fields:

Field	Description
Graduation Plan	The name of the graduation plan.
Subject Group	The name of the subject group.
Path to Node	The location of the subject group within the subject group list.
Waiver Type	Choose a waiver type from the pop-up menu.
Waiver Reason	Choose a waiver reason from the pop-up menu.
Waiver Source	Choose a waiver source from the pop-up menu.
Elective Subject Group	Choose an elective subject group from the pop-up menu.
Waiver Date	Indicate the date the waiver is effective.
Credit Waived	Indicate the number of credits to waive.
Authorized By	Choose the name of the person authorizing the waiver from the pop-up menu.

5. Click **Submit**. The Add Waiver drawer closes.

How to Edit a Subject Group Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Subject Groups section, click the **Pencil** icon next to the subject group for which you want to edit a waiver. The Edit Waiver drawer opens.
4. Edit as needed. For detailed field descriptions, see *How to Add a Waiver*.
5. Click **Submit**. The Edit Waiver drawer closes.

How to Delete a Subject Group Waiver

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Plan Progress** from the student pages menu. The Graduation Plan Progress page appears.
3. In the Subject Groups section, click the **Pencil** icon next to the subject group for which you want to delete a waiver. The Edit Waiver drawer opens.
4. Click **Delete**.
5. Click **Confirm Delete**. The Edit Waiver drawer closes.

Graduation Progress

The information on this page is a compilation of the student's grades and the graduation requirements for your school. For most people it is view-only, so you will not be able to make any changes. If you find an error, it must be corrected either in the student's grades or in the requirements.

Note: Field level security may be used to restrict this information (STUDENTS.GRADREQSETID). For more information, see *Field Level Security*.

How to View Student Graduation Progress

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Graduation Progress** from the student pages menu. The Graduation Progress page appears.
3. Choose the appropriate graduation requirement set from the **Graduation Requirement Set** pop-up menu.
4. Click **Submit**. The Graduation Progress page displays the student's progress towards graduation.

Note: A course may appear more than once on a student's graduation requirements page, most likely because that class fulfills multiple requirements and not because the student enrolled in the class more than once. For more information about how to enter graduation requirements or change how graduation requirements appear in PowerSchool, see *Graduation Requirements*.

Historical Grades

Historical Grades In PowerSchool, student records include two types of grades: current and historical. Current grades are students' grades entered by each of their teachers through PowerTeacher Gradebook. Current grades change with each new assignment that teachers enter in PowerTeacher Gradebook. Teachers, administrators, and parents use current grades to track student progress throughout a grading term.

Historical grades are final grades, or grades that are permanently stored in the student's record. At the end of each grading term, your PowerSchool administrator copies and stores the students' current grades from PowerTeacher Gradebook to historical grades. Historical grades appear on report cards and transcripts.

This function displays your selected student's grades from previous terms. You have the choice of using a normal view or a detail view.

Note: The Historical Grades student page view is view-only for most users; only those with proper access, such as a school counselor, have the right to edit historical grades. Teachers who assign grades and need to change them later must contact a user with the proper access.

How to View Historical Grades

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears. For each course in which the student earned a grade, the page displays the following:
    - Year/Term - Year and store code of the term in which the student enrolled in the course.
    - Grd Lvl - Student's grade level at the time he or she enrolled in the course.
    - Course number - The number of the course.
    - Course - The name of the course.
    - Earned credit - Number of possible credit hours the student can earn in the course.
    - **[Terms]** - Historical grade the student earned in each grading term. Click a grade to access the Edit Stored Grade page.

Note: The Normal View page displays only the grades the student received during the grade levels of the current school.

3. Click **Detail View** to view expanded information and the grades the student received at other grade levels. The Complete Academic Record Detail View page appears.

   Note: The Complete Academic Record Detail View page displays all of the student's historical grades in PowerSchool. The Detail View page is not specific to the grade levels at this school.

4. In addition to the information on the Historical Grades page, this page displays the following detailed credit information:
   - Year/Term - Year and store code of the term in which the student enrolled in the course.
   - Grd Lvl - Student's grade level at the time he or she enrolled in the course.
   - Course # - The number of the course.
   - Course Name - The name of the course.
   - Stored Code - Each grading term the student earned a historical grade.
   - **Grade** - Historical grade the student earned in each grading term. Click a grade to access the Edit Stored Grade page.
   - Earned Credit - Number of credit hours the student earned in each course.
   - Pot. Credit - Potential credit hours the student could earn in each course.
   - Earns Grad Credit - Indicates if the course is included in a graduation requirement and the credits the student earned count towards the requirement.
   - GPA - Indicates if the grade in the course is included in the student's GPA calculation.
   - Class Rank - Indicates if the grade in the course is included in the class rank calculation.
   - Excluded from Honor Roll - Indicates if the grade in the course is included in the honor roll calculation.
   - Transcripts - Indicates if the grade in the course is included in transcripts.
   - Credit Type - Indicates if the credits in the course count towards a graduation requirement based on credit type.
   - Grade Suppression Code - Indicates if the grade in the course is for a replaced course grade.

     Note: Grade Suppression Code only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.

Note: Your school can create credit types to group courses together to fill a graduation requirement. Assign credit types to courses or final grades and then specify that a requirement be filled by any courses or grades of that credit type. For example, you specify that any two courses with the ALGEBRA credit type fulfill a math requirement.

5. Click **Normal View** to return to the Historical Grade page. The Historical Grades page (Normal View) reappears.

How to Create a Single Historical Grades Entry

Enter a student's grades one at a time for incoming students. Alternatively, use the Multiple New Entries function on the Academic Record Entry page to enter a single grade. Most schools use the Academic Record Entry page to enter all grades.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Single New Entry**. The New Stored Grade page appears.
4. Use the following table to enter information in the fields:

Field	Description
School Name	Enter the name of the school where the student received the grade.
School Year	Enter the year for which you want to enter a grade.
Hist. Grade Level	Enter the grade level of the student when he or she received the grade.
Store Code	Enter the store code that your school uses for the term in which the student earned the grade. Store codes are determined in the final grade setup area on the School Setup page.
Course Number - Section Number	You must provide one of the following:

[or] Course Name	• The course and section number of an existing section at the currently selected school. • The course name if this is historical data for which no section record exists. If you provide a course and section, this grade will be associated with the student's enrollment in that section and will print on report cards. If you supply only the course name, the grade will print on transcripts but not on report cards since it is not associated with an actual section enrollment. In either case, the grade will be included in transcripts, the Previous Grades screen, and GPA calculations.
Teacher Name	Enter the name of the teacher that taught the class.
Grade	Enter the letter grade the student earned.
GPA Points	Enter the number of grade points the student received for this grade.
Added Value	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values.
Percent	Enter the percent grade the student earned.
Citizenship	Enter the citizenship grade for the term.
Earned Credit Hours	Enter the number of credit hours the student earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.
Potential Credit Hours	Enter the total number of credit hours the student could have earned in the course.

	Note: The number of earned credit hours and potential credit hours must be the same.
Credit Type	If you could not match the course in which the student received this grade to a course at your school and you entered a course name, enter the credit type that counts towards the requirement if this grade fulfills a specific graduation requirement at your school. For example, if a student earned the grade in Russian, and your school does not offer Russian, enter **Russian** in the Course Name field. Then, to have the grade the student earned count towards the foreign language graduation requirement, enter **Foreign Language** or a similar credit type name in this field. Otherwise, deselect the checkbox.
Grade Suppression Policy Override	To override the section or course's grade scale grade suppression policy, choose the grade suppression policy you want to apply from the pop-up menu. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Calculation	Do one of the following: • Select **Include** to include the grade in the Grade Suppression calculation. • Select **Exclude** to exclude the grade from the Grade Suppression calculation. **Note:** The repeated course suppression process automatically runs after clicking **Submit**. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.

Exclude from GPA?	Do one of the following: • Select **Include** to include the grade in the GPA calculation. • Select **Exclude** to exclude the grade from the GPA calculation.
Exclude from Class Rank?	Do one of the following: • Select **Include** to include the grade in the class rank calculation. • Select **Exclude** to exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Do one of the following: • Select **Include** to include the grade in the honor roll calculation. • Select **Exclude** to exclude the grade from the honor roll calculation.
Teacher Comment	Enter any comments from the teacher.

5. Click **Submit**. The Historical Grades page displays the new grade.

How to Create Multiple Historical Grades Entries

This option for entering historical grades is helpful when a student transfers from another school and all previous grades must be entered in PowerSchool.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Multiple New Entries**. The Academic Record Entry page appears.
4. Use the following table to enter information in the fields:

Field	Description
School Name	Enter the name of the school where the student received the grade.
School Year	Enter the year for which you want to enter a grade.
Hist. Grade Level	Enter the grade level of the student when he or she received the grade.
Grade Suppression Policy Override	To override the section or course's grade scale grade suppression policy, choose the grade suppression policy you want to apply from the pop-up menu. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Calculation	Do one of the following: • Select **Include** to include the grade in the Grade Suppression calculation. • Select **Exclude** to exclude the grade from the Grade Suppression calculation. **Note:** The repeated course suppression process automatically runs after clicking **Submit**. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Store Code	Enter the store code that your school uses for the term in which the student earned the grade. Store codes are determined in the final grade setup area on the School Setup page.

5. Use the following table to enter information for each course per term in the indicated school year:

Field	Description
Course Number - Section Number [or] Course Name	You must provide one of the following: • The course and section number of an existing section at the currently selected school. • The course name if this is historical data for which no section record exists. If you provide a course and section, this grade will be associated with the student's enrollment in that section and will print on report cards. If you supply only the course name, the grade will print on transcripts but not on report cards since it is not associated with an actual section enrollment. In either case, the grade will be included in transcripts, the Previous Grades screen, and GPA calculations.
Teacher Name	Enter the name of the teacher that taught the class.
Credit Type	If you could not match the course in which the student received this grade to a course at your school and you entered a course name, enter the credit type that counts towards the requirement if this grade fulfills a specific graduation requirement at your school. For example, if a student earned the grade in Russian, and your school does not offer Russian, enter **Russian** in the Course Name field. Then, to have the grade the student earned count towards the foreign language graduation requirement, enter **Foreign Language** or a similar credit type name in this field. Otherwise, deselect the checkbox.
Exclude from GPA?	Do one of the following: • Select **Include** to include the grade in the GPA calculation.

	• Select **Exclude** to exclude the grade from the GPA calculation.
Exclude from Class Rank?	Do one of the following: • Select **Include** to include the grade in the class rank calculation. • Select **Exclude** to exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Do one of the following: • Select **Include** to include the grade in the honor roll calculation. • Select **Exclude** to exclude the grade from the honor roll calculation.
Grade	Enter the letter grade the student earned.
GPA Points	Enter the number of grade points the student received for this grade.
Added Value	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values.
Percent	Enter the percent grade the student earned.
Citizenship	Enter the citizenship grade for the term.
Earned Credit	Enter the number of credit hours the student earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.

Potential Credit	Enter the total number of credit hours the student could have earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same.

6. Repeat Step 5 for additional courses.
7. Click **Submit**. The Historical Grades page displays the new grades.

How to Edit a Stored Grade

There are times when it is necessary to change a historical (stored) grade. Because such a change can have a serious impact on a student's permanent record, stored grades must be changed one by one.

Note: You can create a log entry to track each time you change a grade for a student. For more information, see *Log Entries*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click the grade to be changed. The Edit Stored Grade page appears.
4. Use the following table to change a student's historical grade information on the Edit Stored Grades page:

Field	Description
School	The school name appears.
Term ID	Enter the 4-character value of the term associated to the grade. **Note:** If this grade is already associated to a Course Number - Section Number, then this field is not editable. **Note:** The grade does not automatically change with the percentage and vice versa. If you change one, you must manually change the other. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.

School Year (Term)	The school year and term appear.
Store Code	The store code appears. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Hist. Grade Level	The grade level in which the student enrolled in the course appears. You can edit the grade level. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Associated Section	The section of the course in which the student was enrolled appears.
Course Number	The number of the course in which the student earned the grade appears.
Course Name	The name of the course in which the student earned the grade appears.
Teacher Name	Enter the name of the teacher of the course section.
Associated Grade Scale	The name of the associated grade scale appears.
Grade	The letter grade originally entered for the student appears. You can edit the grade.
GPA Points	Enter the point value that corresponds to the grade. For example, enter **4.0** for an A. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox appears selected.

Added Value	Enter any added value for the grade points, such as **1** for one additional grade point. You can also use fractions of a point. Most schools do not enter added values. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox appears selected.
Percent	Enter the percent grade the student earned.
Citizenship	Enter the citizenship grade for the term.
Absences	Enter the number of absences for the course in the term.
Tardies	Enter the number of tardies for the course in the term.
Earned Credit Hours	Enter the number of credit hours the student earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Potential Credit Hours	Enter the total number of credit hours the student could have earned in the course. **Note:** The number of earned credit hours and potential credit hours must be the same. **Note:** If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected.
Credit type	If you could not match the course in which the student received this grade to a course at your school and you entered a course name, enter the credit type that counts towards the requirement if this grade fulfills a specific graduation requirement at your school. For example, if a student earned the grade in Russian, and your school does not offer Russian, enter **Russian** in the Course Name

	field. Then, to have the grade the student earned count towards the foreign language graduation requirement, enter **Foreign Language** or a similar credit type name in this field. Otherwise, deselect the checkbox.
Grade Suppression Policy Override	To override the section or course's grade scale grade suppression policy, choose the grade suppression policy you want to apply from the pop-up menu. Once a selection is made, stored grades associated to this grade scale will be evaluated based on the selected grade suppression policy during the permanently store grades process. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Code	Indicate the repeated course grade suppression value of the stored grade by choosing one of the following from the pop-up menu: • **Blank** - Stored grade is not for a replaced course grade. • **Replaced Grade (R) -** Stored grade is for a replaced course grade. • **Over Maximum Credit (M)** - Maximum credit hours. **Note:** The repeated course grade suppression value is blank by default unless it has been calculated by the permanently store grades process. However, it can be entered manually or adjusted after it has been calculated. If you want to prevent any future grade calculations from changing this value, choose to exclude from grade suppression calculation. When excluded, this value will be ignored during the repeated course grade suppression processing. Selecting **Replaced Grade (R)** does not automatically adjust whether the grade is excluded from transcripts or GPA, honor roll, class rank, or graduation calculations. However, these settings can be adjusted manually.

	Selecting **Over Maximum Credit (M)** does not automatically adjust whether the grade is excluded from graduation calculation. However, these settings can be adjusted manually. **Note:** If the grade was previously replaced or was replacing another grade, adjusting the repeated course grade suppression value will remove this association. **Note:** This field is only available when editing a stored grade. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Repeated Course Grade Details	Click to view the Repeated Course Grade Details pop-up, which displays the following grade replacement succession: • Grade Order • **Grade** - Click to access the Edit Stored Grade page for the repeated course grade. • Course Number • Course Name • Store Code • Term • Grade Suppression **Note:** The current repeated course grade appears highlighted. **Note:** This link only appears if there are other grades related based on the repeated course grade suppression calculation. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.
Grade Suppression Calculation	Do one of the following: • Select **Include** to include stored grades in grade suppression calculation during the permanently store grades process.

	• Select **Exclude** to exclude stored grades from grade suppression calculation during the permanently store grades process. Note: If this field is modified, the **Repeated Course Grade Suppression** checkbox is automatically selected. **Note:** This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*. **Note:** If a grade has already been replaced by the Repeated Course Grade Suppression process and then is set to be excluded from the calculation, the Grade Suppression Code and the relationship to the replacing grade will persist and never be considered by subsequent grade suppression calculations. This could cause a grade to replace more than one other grade. To prevent this, clear the **Grade Suppression Code** prior to setting **Grade Suppression Calculation** to **Exclude**.
Display on Transcript	Do one of the following: • Select **Yes** to include stored grade in transcripts. • Select **No** to exclude stored grade from transcripts. **Note:** For more information, see *Transcript Objects*.
GPA Calculation	Do one of the following: • Select **Include** to include the grade in the GPA calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the GPA calculation during the permanently store grades process.
Class Rank Calculation	Do one of the following: • Select **Include** to include the grade in the class rank calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the class rank calculation during the permanently store grades process.

Honor Roll Calculation	Do one of the following: • Select **Include** to include the grade in the honor roll calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the honor roll calculation during the permanently store grades process.
Graduation Calculation	Do one of the following: • Select **Include** to include the grade in the graduation calculation during the permanently store grades process. • Select **Exclude** to exclude the grade from the graduation calculation during the permanently store grades process. **Note:** For more information, see *Repeated Course Grade Suppression*.
Teacher Comment	Enter any comments from the teacher.
Change History	A list of any changes to this grade appears.
Repeated Course Grade Suppression	Indicate whether or not to run the repeated course grade suppression process by doing one of the following: • Select the **Run** checkbox to run the repeated course grade suppression process. • Deselect the **Run** checkbox if you do not want to run the repeated course grade suppression process. **Note:** If the **Grade Suppression Code** is modified, the checkbox no longer appears. **Note:** By default, the checkbox is not selected. However, if **Term ID**, **Store Code**, **Hist. Grade Level**, **GPA Points**, **Added Value**, **Earned Credit Hours**, **Potential Credit Hours** or **Grade Suppression Calculation** are modified, the checkbox appears selected. **Warning**: Running the Repeated Course Grade Suppression process may affect other stored grades.

	Note: This field only appears if Repeated Course Grade Suppression is enabled for the selected school. For more information, see *Repeated Course Grade Suppression*.

5. Click **Submit**. A confirmation message appears.

How to Delete a Stored Grade

Before deleting a class from a student's historical grades, be certain this is what you want to do. You are not only deleting the grade from the historical record, you are also deleting the class from the student's permanent record. Though this function does not delete the class from the master schedule, the student's historical grades for this class cannot be retrieved once deleted.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click the grade you want to delete. The Edit Stored Grade page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears. If you delete the last grade for a class, the class no longer appears on the Historical Grades page.

How to Override Course Names

You can override a district-assigned course name if you enter a course name along with a valid course number on the Historical Grade screen. The following rules apply when overriding the course name:

- Course Number is optional. If it is not included, the Course Name is used.
- If a Section Number is entered, it must exist in the system.
- If no Course Name is entered and a valid Course Number is entered, it will default to the name in the Courses table.
- If no Course Name is entered or found, an error dialog appears and the changes are not saved.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.

3. Click **Single New Entry**. The New Stored Grade page appears.

   Note: To change several course names, click Multiple New Entries. The Academic Record – Entry page appears.

4. Enter the course name in the Course name field.
5. Click **Submit**.

How to Edit Previous School Names

Use this function to change or enter the name of the school where a class was taken. If you entered a school name when entering the historical grades, it appears on this page. If you did not enter a school name, do so from this page.

Note: The school names you enter appear on the student's transcript next to the school year during which he or she attended the school. If a student attended more than one school during a school year, each school and the grades the student received at that school appear in separate lists.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Historical Grades** from the student pages menu. The Historical Grades page appears.
3. Click **Previous School Names**. The Historical School Names page appears.
4. Enter or change the name of the schools where the courses were taken.
5. Click **Submit**. The Changes Recorded page appears.
6. Once you have submitted, you can:
   - Click the grade to display the school name on the Edit Stored Grade page.
   - Repeat this procedure by leaving the School Name field blank to reset a changed previous school name. The Edit Stored Grade page displays the current school.

Honor Roll

You can view results of honor roll calculations for a single student or a group of students. To view honor roll calculations for a single student, search for and select the student, and then choose Honor Roll from the student pages menu. The Honor Roll page displays all honor rolls the student has received, even if the honor roll was received in another school.

Note: To view honor roll calculations for a group of students, see *How to Run the Honor Roll Report*.

How to View a Student Honor Roll Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Honor Roll** from the student pages menu. The Honor Roll page appears.
3. Use the following table to enter information in the fields:

Type	Description
School Year	The school year when the honor roll was earned.
Grade Level	The historical grade level for this honor roll record.
School Name	The name of the school where honor roll record was issued.
Store Code	The store code for the honor roll record.
Honor Roll Method	The name of the honor roll method that was calculated.
Level Met	The name of the honor roll level earned. Click to access the Edit Honor Roll page.

4. Do one of the following when done viewing:
   - Choose another item from the student pages menu.
   - Click the **Back** button on your browser.

How to Edit Student Honor Roll Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Honor Roll** from the student pages menu. The Honor Roll page appears.
3. Click the level met of the honor roll you want to edit. The Edit Honor Roll page appears.
4. Use the following table to enter information in the fields:

Type	Description

School	The name of the school where the honor roll was earned. This field is read-only.
School Year	The school year when the honor roll was earned. This field is read-only.
Store Code	The store code for the honor roll record. This field is read-only.
Grade Level	The historical grade level for this honor roll record.
Method	The name of the honor roll method that was calculated.
Level	The name of the honor roll level earned.
GPA	The GPA that was used as part of the honor roll calculation.
Message	The text message associated with the honor roll level.
Change History	A text log detailing when changes were made, who made those changes, and what was changed for this record. This field is read-only.

5. Click **Submit**. The changes are reflected immediately and an entry appears in the change history.

How to Delete Student Honor Roll Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Honor Roll** from the student pages menu. The Honor Roll page appears.
3. Click the level met of the honor roll you want to delete. The Edit Honor Roll page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

View Single Student Standards

The single student standards page lists a student's progress for all of the specific standards in each of their classes.

How to View Single Student Standards

This page displays the student's progress towards meeting the specific standards assigned to each of their classes. This page displays information for classes currently in progress, completed classes, dropped classes, and previous standards grades records that are not associated to any specific class. For more information about standards, see *Standards*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Standards** from the student pages menu. Alternatively, you can access this page from the Quick Lookup page, which provides a read-only version of the Standards page. For more information, see *Quick Lookup*.
3. To view standards from a previous year, make a selection from the Year pop-up menu. The standards for the selected year appear.
4. To view those standards that currently have no associated grade, select the **Show Standards with No Grades** checkbox.
5. Click **Expand All** to view all standards for the student.
6. Click **Collapse All** to collapse all standards listings.

   Note: Alternately, click the triangle next to a section to view all standards for an individual section. Click the triangle again to collapse the standards listing.

7. Click on a grade under a reporting term. The Edit Standards Final Grades drawer appears.
8. Use the following table to edit information in the fields:

Field	Description
Standard	The identifier and standard name. Read only.
Store Code (Year)	The reporting term and school year in which the standard was assessed. Read only.
School	The school in which the standard was assessed. Read only.
Last Updated	The date the score was last changed. Read only.

Teacher	The teacher for the section in which the standard was assessed. Read only.
Course and Section	The course and section name. Read only.
Grade	For an Alpha grade scale, select a final grade for the standard from the pop-up menu. For a Numeric grade scale, enter a final grade in the field provided. **Note:** This field is read-only in the Quick Lookup version of this page.
Percent	Enter the percent value for the grade. Read only.
Comment	Displays comment text from individual teacher. If more than one teacher is assessing the student on this same standard, the comments are concatenated with the course name and teacher name. This field is editable.
Exclude from Reports	Select the checkbox to exclude from standards reports.
Standard Grade Rollup	**Note:** This section only appears if the student is being assessed on the same standard in different classes at the same time. For more information, see the View Standard Grade Roll-up section.

Note: If the message "Teacher comment exceeds the maximum comment length school setting. Comment will be truncated if submitted." appears, you can re-enter the standards final grade comment (based on the defined comment length) in PowerTeacher Gradebook. For detailed information, see *Add Standards Final Grade Comments* in *PowerTeacher Gradebook User Guide* available on PowerSource. Or, you can increase the standard grade comment length in the PowerSchool admin portal. For detailed information, see *How to Define Standard Grade Comment Length*.

9. Click **Submit** to save your changes or click Cancel to revert changes. The drawer closes and the Standards page appears.
10. Click on the Comment icon in any term column to view the comment entered for the standard. See the Legend at the bottom of the page for an explanation of the icons that appear on the page.

View Standard Grade Rollup

You can view details of the standard grade rollup from the student Standards page. In cases where the same student is being assessed on the same standard (for example, Scientific Principles) in different classes at the same time (for example, Q1), the standards grades for each individual section are retained. In addition, they are averaged together to produce a rollup score. The high score is also stored.

How to View the Standard Grade Rollup

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Standards** from the student pages menu. Alternatively, you can access this page from the Quick Lookup page, which provides a read-only version of the Standards page. For more information, see *Quick Lookup*.
3. Click on a grade under a reporting term. The Edit Standards Final Grades drawer appears.
4. Scroll down to view the Rollup Grade section. The rollup includes the average grade, the highest grade, and the number of grades that were included to generate the average. The Grades Contributing to the Rollup section displays the section specific grades that were used to generate this rollup record, and a rollup comment if available.

Student Grade Scales

The Student Grade Scales page allows you to associate a custom grade scale to a student record. Using this page, you can associate a grade scale directly to the student's sections, view the grade scale attributes, and choose if you want the teacher to have the ability to change the grade scale associated with the student. The teacher will see a custom grade scale indicator in their gradebook.

Note: This page is only accessible if the security group has the page enabled on the Edit Groups page in PowerSchool. For more information, see *How to Edit Security Groups*.

How to View Student Grade Scales

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Student Grade Scales** from the student pages menu. The Student Grade Scales page appears.
3. Use the following table to work with grade scales:

Field	Description
[Checkboxes]	Do one of the following: • Select the checkbox in the header row to select all sections. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all incidents. • Select the checkbox for each section you want to work with. For more information, see *How to Associate Multiple Sections to a Grade Scale*.
Course Number.Section Number	The course number and section number used to identify the section.
School	The school associated with the section.
Teacher	The name of the teacher associated to the section.
Term	By default, the student's schedule for the current term appears. Use the Term selector to select a different term.
Enrollment Status	The enrollment status for the selected student.
Grade Scale	Choose a grade scale from the pop-up menu. Once a grade scale is selected, click the **Information icon** next the grade scale to view the grade scale details.
Teacher Editable	Select the checkbox if the teacher can associate a different grade scale for this student.

4. Click **Submit**.

How to Associate Multiple Sections to a Grade Scale

When you select a checkbox next to a section, the **Change Selected** button is active. Use this feature if you want to change multiple sections to a single grade scale.

1. Select the applicable checkbox or checkboxes next to the sections you want to change.
2. Click C**hange Selected**. The Select Grade Scale dialog appears.
3. Select the grade scale from the pop-up menu.
4. Select the **Teacher Editable** checkbox, if applicable.
5. Click **Confirm**.
6. Click **Submit**.

Teacher Comments

The Teacher Comments page displays any comment that a teacher has entered regarding a student, such as a student's achievement or behavior. Comments can be entered using PowerTeacher or PowerTeacher Gradebook.

If using PowerTeacher, comments can be entered using the Final Grade Entry pages if the Final Grade Entry function has been enabled. For more information, see *Final Grade Entry*. If using PowerTeacher Gradebook, comments can be entered using the Scoresheet Final Grades window. For more information see *Final Grades* in the *PowerTeacher Gradebook User Guide* available on PowerSource.

Note: Teachers using PowerTeacher should **NOT** use PowerTeacher Gradebook.

Note: The Comment Bank is only available in PowerTeacher Gradebook at this time. For more information about creating comments in the comment bank, see *Comment Bank*.

Once a comment is entered, it can be viewed in PowerSchool, PowerTeacher, and the PowerSchool Student and Parent portal.

How to View Teacher Comments

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Teacher Comments** from the student pages menu. The Teacher Comments page appears.
3. Use the following table to view teacher comments:

Field	Description
Reporting Term	By default, the student's schedule for the current term appears. Use the pop-up menu to select a different term.

Exp.	The expression indicates the period and day combination of the course.
Course #	The course number indicates the number used to identify the course.
Course	The name of the course.
Teacher	The name of the teacher teaching the course.
Attendance Points	The number of attendance points the student received for the course, such as absent=1, tardy=2, and present=0.
Comment	Comment entered by teacher. **Note:** If the column is blank, there are no teacher comments.
Show dropped classes	Click to view currently enrolled classes and dropped classes.
Show only current classes	Click to view only currently enrolled classes.

Term Grades

Use this page to view term grades for the selected student. The course, letter grade, percentage points, citizenship grade, and credit hours are noted for each term.

How to View Term Grades

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Term Grades** from the student pages menu. The Term Grades page appears. By default the current year is selected.
3. Click the term tab you want to view.
4. If viewing the current year, click the percentage to view a detailed breakdown of the assignments that make up the grade. The Scores page displays the assignments and

the selected student's scores for that class. For more information, see *How to View Student Assignment Scores*.

Note: Icons indicate the status of assignments. For more information, see the icon legend at the bottom of the page.

The Test Results page displays comprehensive information about a student's test results. Additionally, if your district has set up tests, you can enter, edit, or delete test results for an individual student.

Benchmark Tests

Using the Benchmark Tests tab, you can view comprehensive information about a student's benchmark test results. Benchmark tests may be viewed by test or by standard.

Note: The Benchmark Tests tab only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you. The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Benchmark Tests tab, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.
Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system administrator for assistance.	Indicates one of the following: • Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

How to View Benchmark Test Results by Test

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** (default) • **State Benchmark** • **District Benchmark** • **School Benchmark**
View By	Choose the **Test** option.

The following information appears for each test the student has taken:

- Test Name and Description
- Test Date
- Test Score
- Score Group

5. Click the name of the test to view further details.
6. Click the **Benchmark Tests** tab to return to list of benchmark tests.

   Note: For more information, see the *Schoolnet online help*.

How to View Benchmark Test Results by Standard

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Benchmark Tests** tab. Benchmark tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** (default) • **State Benchmark** • **District Benchmark** • **School Benchmark**
View By	Choose the **Standard** option.

The following standards information appears for each test the student has taken:

- Standard
- Last Assessed
- Score
- Score Group

5. Click the name of the standard to view further details.
6. Click the **Benchmark Tests** tab to return to list of benchmark tests.

   Note: For more information, see the *Schoolnet online help*.

Classroom Tests

Using the Classroom Tests tab, you can view comprehensive information about a student's classroom test results. Classroom tests may be viewed by test or by standard.

Note: The Classroom Tests tab only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you. The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Classroom Tests tab, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.
Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system administrator for assistance.	Indicates one of the following: • Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

How to View Classroom Test Results by Test

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Classroom Tests** tab. Classroom tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu:

	• **All Test Categories** • **Common Classroom** • **My Classroom**
View By	Choose the **Test** option.

The following information appears for each test the student has taken:

- Test Name and Description
- Test Date
- Test Score
- Score Group

5. Click the name of the test to view further details.
6. Click the **Classroom Tests** tab to return to list of classroom tests.

   Note: For more information, see the *Schoolnet online help*.

How to View Classroom Test Results by Standard

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Classroom Tests** tab. Classroom tests for the selected student appear.
4. Use the following table to enter information in the Filters fields:

Field	Description
School Year	Choose the school year from the pop-up menu.
Test Category	Choose one of the following test categories from the pop-up menu: • **All Test Categories** • **Common Classroom** • **My Classroom**

View By	Choose the **Standard** option.

The following standards information appears for each test the student has taken:

- Standard
- Last Assessed
- Score
- Score Group

5. Click the name of the standard to view further details.
6. Click the **Classroom Tests** tab to return to list of classroom tests.

   Note: For more information, see the *Schoolnet online help*.

Standardized Tests

Using the Standardized Tests tab, you can view comprehensive information about a student's classroom test results.

Note: The Standardized Tests tab only appears if Schoolnet is enabled at the system level and at least one role has been assigned to you. The content that appears is not served by PowerSchool. It is rendered from a separate Schoolnet server. If content does not appear, contact your school's PowerSchool administrator.

Note: When accessing the Standardized Tests tab, you may encounter one or more of the following error messages:

Error	Description
Test results are currently unavailable. Please try again later.	Indicates that the system is down and cannot make network contact.
Test data is not available for this student.	Indicates there is currently no test data available for the student.
Record could not be found. Check with your system	Indicates one of the following:

administrator for assistance.	• Student is not enrolled at a school that is integrated with Schoolnet. • Student's account has not yet been set up in Schoolnet. • Student's account has been set up in Schoolnet, but credentials are still being set up.

How to View Standardized Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **Standardized Tests** tab. Standardized tests for the selected student appear.
4. Choose the **School Year** from the pop-up menu. The following information appears for each standardized test the student has taken:
   - Section
   - Score Group
   - Raw Score
   - Scaled Score
5. Click the name of a standardized test to view test details.
6. Click the **Standardized Tests** tab to return to list of standardized tests.

   Note: For more information, see the *Schoolnet online help*.

PowerSchool Test Scores

Using the PowerSchool Test Scores tab, you can easily manage test results for an individual student.

Note: In order for tests to appear in the **Enter New Test** pop-up menu, they must first be created using *Tests Setup*.

Note: If Analytics is enabled, click **Analytics Student View** to view the Analytics Student View page. For more information, see *Enable Analytics*.

How to Enter Student PowerSchool Test Scores

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **PowerSchool Test Scores** tab.
4. Choose a test from the **Enter New Test** pop-up menu. If selecting the test that currently appears, click **Submit**. The New Student Test: [Test Name] page appears.

   Note: is not necessary to have all three score types (number, percent, or alpha) when importing a score. Import one, two, or all three score .

5. Use the following table to enter information in the fields:

Field	Description
Test	The selected test appears.
Date	Enter the date of the test using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Term	Choose the term from the pop-up menu.
Grade Level	Enter the grade level for the test.
Score	For each of the test results, enter the number score, the percent score, and the alpha letter grade.

6. Click **Submit**. The Test Results page displays the new test score for that student.

How to Import PowerSchool Test Scores

Use the Import Test Results function when setting up your initial PowerSchool data, enrolling a large number of new or transferring students, or entering test results for students after receiving the test results. Before importing test results, you must have an ASCII text file containing the test score data being imported, preferably delimited by tabs.

The following table displays a sample import file for eleventh graders who recently took the ACT. This example shows an import file reporting the numeric scores, test date, and students' grade level at the time the test was given. The test results are named Composite, English, Math, Reading, and Science.

student_number	Date	grade_level	composite	english	math	reading	science
645236653	8/7/03	11	18	18	17	16	21
645236741	8/7/03	11	28	29	27	29	25
645236654	8/7/03	11	18	14	22	19	18

To record the numeric, percentage, and alphanumeric scores for test results, use the following numeric suffixes after the column headings and one space:

- [Column name] 1: Displays the numeric score. For example, include in the Math 1 column the scores 17, 27, and 22.
- [Column name] 2: Displays the percentage score. For example, include in the Math 2 column the scores 57%, 90%, and 73%.
- [Column name] 3: Displays that alphanumeric score. For example, include in the Math 3 column the scores F, A-, and C.

Note: It is not necessary to have all three score types (number, percent, or alpha) when importing a score. Import one, two, or all three score types.

The following table displays a sample import file for eleventh graders who recently took a district-level math test. This example shows an import file reporting the numeric, percentage, and alphanumeric scores, test date, and students' grade level at the time the test was given.

student_number	Date	grade_level	Math 1	Math 2	Math 3
645236653	8/7/03	11	17	57	F
645236741	8/7/03	11	27	90	A-
645236654	8/7/03	11	22	73	C

Before importing test results, you must first create a test and its scores. For more information, see *How to Create New Tests* and *How to Create Test Scores*.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Quick Import**. The Quick Import page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Table	Choose the **Test Results** table from the pop-up menu.
Field delimiter	Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. If you choose **Other**, enter the delimiter in the field.
End-of-line marker	Choose the end-of-line marker from the pop-up menu. This refers to the item that will separate the records in the exported data. If you choose Other, enter the delimiter in the field. • **CR:** Carriage return • **CRLF:** Carriage return line feed • **LF:** Line feed
File to import	Click **Browse...** next to the File to import field. Navigate to the data file and click b.
Suggest field map	Select the checkbox to have the system suggest PowerSchool field names for the information in the data file. These are just suggestions and can be changed.
School	The selected school appears.

5. Click **Import**. The Select Test page appears.
6. Choose a test from the **Test** pop-up menu. If the test you want does not appear, create it. For more information, see *How to Create New Tests*.
7. Click **Submit**. The Import Records from an ASCII Text File page appears.

8. Choose the PowerSchool field into which you want to enter each value from the To PowerSchool pop-up menu.
9. Select the checkbox to exclude the first row. Depending on the text file, the first row may include information about the file and not about the student test results.
10. Enter the imported value you want to use in the unmapped field and choose the PowerSchool field from the pop-up menu.
11. Click **Submit**. The Import Progress page displays the records that were successfully imported and those that the system could not import because of your specifications. The system imports the data into the Test Scores table. Depending on the type of data, you can view, edit, and report on it.

How to Edit Student PowerSchool Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **PowerSchool Test Scores** tab.
4. Click the name of the test you want to edit. The Edit Student Test: [test name] page appears.
5. Edit the information as needed. For field descriptions, see *How to Enter Student Test Results*.
6. Click **Submit**. The Test Results page displays the edited test score for that student.

How to Delete Student PowerSchool Test Results

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Test Results** from the student pages menu. The Test Results page appears for that student.
3. Click the **PowerSchool Test Scores** tab.
4. Click the name of the test you want to delete. The Edit Student Test: [test name] page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Delete page appears.

Truancies

This function provides a quick view of a student's truancies. From the Truancies page, enter and change records of truancy occurrences.

How to View Truancies

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Truancies** from the student pages menu. The Truancies page displays any truancy on the selected student's record. If there are no truancies listed, the student does not have any truancy recorded.

How to Create a New Truancy Record

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Truancies** from the student pages menu. The Truancies page appears.
3. Click **New**. The New Truancy Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Student	The selected student appears.
Date	Enter the date of the truancy using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Reason/Title	Enter the reason for the truancy record. Many schools have a set list of options for reporting and tracking purposes.
Number	Enter the number used to calculate attendance for the record. This can be a positive or negative number, depending on the system your school uses.
Comments	Enter any comments about the truancy.

5. Click **Submit**. The Changes Recorded page appears.

How to Edit a Truancy Record

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Truancies** from the student pages menu. The Truancies page appears.
3. Click the date of the entry you want to edit. The Edit Truancy Record page appears.
4. Edit the information as needed. For field descriptions, see *How to Create a New Truancy Record*.
5. Click **Submit**. The Changes Recorded page appears.

How to Delete a Truancy Record

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Academics, choose **Truancies** from the student pages menu. The Truancies page appears.
3. Click the date of the entry you want to delete. The Edit Truancy Record page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Administration

District Specific

This menu item provides select information on students and is set up by the PowerSchool administrator for your district.

How to Edit District-Specific Student Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **District Specific** from the student pages menu. The District Specific page appears.
3. Edit the information as needed. To edit IPT or CRT information, click the appropriate link and edit the scores.
4. Click **Submit**. The District Specific page displays your changes.

   Note: Your PowerSchool administrator can modify this page to meet your school's needs.

Fee Transactions

Fee Transactions represent the exchanges of funds for a student within the PowerSchool system. You can use the Fee Transactions page to view a wide variety of transaction information, including fee record information, transactions associated with a fee, all transactions associated with a student for the current school and year, and global balances associated to a student for each school and year combination. Additionally, you can create transactions, distribute payments, and issue refunds for individual students. For information about fee functions for a group of students, see *Fee Functions*.

Note: Fee Transactions do not apply to lunch account balances. For information about lunch transactions, see *Lunch Transactions*.

How to View Fee Transaction Summary

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page displays the following information:

Field	Description
Balance	The student's total debits and credits for the current year and school. **Note:** The Balance and the Totals may not be the same in cases where the student has a negative balance.
Date	The date the fee transaction occurred. Click to access the Transactions page, which displays information about the fee record. For more information, see *How to View Fee Record Information*.
Course	The number of the associated course.
Fee Type	The fee type from which the fee transaction was created. For more information, see *Fee Types*.
Priority	The priority in which this fee is to be paid in respect to the other fee types. For more information, see *How to Rank Fee Types*.
Description	An explanation of the fee.
Charged	The total amount charged to the student, considering any adjustments.
Adjust	If a prorated course fee, this is the amount of the fee adjusted for the number of days the student is enrolled within the term for the course section. If a student enrolls in the course after the start date or drops the course before the end date, the student will only be charged an adjusted, prorated fee for that portion of the course. For more information, see *School Enrollment Fees* or *Course Enrollment Fees*.
Fee	The total amount of the fee.

Paid	The amount of the fee that the student has paid. Click to access the Transactions page, which displays the transactions associated with the fee. For more information, see *How to View Transactions Associated with a Fee*.
Balance	The amount of the fee that the student owes.

How to Add Student Fees for an Individual Student

Using the Fee Transactions page, you can manually assess an individual student with student fees, such as Recreational Field Trip. Be sure the information you enter is accurate, as there is no edit or delete function for student fees (to preserve the history of the transaction). If you inadvertently make a mistake, you will have to create a transaction using payment, credit, or void to reverse the effect.

Note: To manually assess a group of students with student fees, see *Fee Functions*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Choose a fee type from **Create New Fee** pop-up menu. The New Fee Transaction page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
New Fee	The selected fee type appears, such as **Recreational**. **Note:** For more information, see *Fee Types*.
Category	The category associated to the fee type appears, such as **Field Trip**. **Note:** For more information, see *Fee Categories*.
Department	Choose the appropriate department from the pop-up menu.

Transaction Date	Enter the date the student fee is to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation of the student fee being created, such as **Excursion to water park**.
Amount of Fee	The dollar amount to be assessed to the student's account balance, such as **75.00**.
Amount of Credit	If the student is providing full or partial payment at the time this fee is being created, enter the payment amount in this field, such as **25.00**. **Note:** If the student's payment is greater than the fee, the extra money will be applied as payment to other unpaid fees based on fee type priority.
Payment Method	If the student is providing full or partial payment at the time this fee is being created, choose the method of payment from the pop-up menu, such as **Check/Draft (Check)**.
Payment Reference Number	If the student is providing full or partial payment at the time this fee is being created, enter the payment reference number in this field, such as **Check Number 4076**.
Course Number	If this fee is related to a course, enter the number used to identify the course in this field, such as **1511 (Biology)**.

5. Click **Submit**. A confirmation message appears.

How to Delete a Fee Record

If a fee record is created in error and there are no payments recorded against the fee record, you can use this procedure to delete the fee record.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click the date in the Date column of the transaction line item you want to delete. The View Fee Transaction page appears.
4. Click **Delete**.

   Note: The Delete button appears shaded if there are payment recorded against the fee record.

5. Click **Confirm Delete**. The Fee Transactions page appears.

How to View Fee Record Information

Use this procedure to view fee record information for a line.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click the date in the Date column of the transaction line item you want to view. The View Fee Transaction page displays the following information:

Field	Description
New Fee	The selected fee type. For more information, see *Fee Types*.
Category	The category associated to the fee type. For more information, see *Fee Categories*.
Transaction Date	The date the student fee was created.
Description	The explanation of the fee.
Amount of Fee	The total amount of the fee.
Amount Paid	The amount of the fee that the student has paid.

Balance	The amount of the fee that the student owes.
Department Name	The name of the department associated to this fee, if any.
Course Number	The number of the course associated to this fee, if any.
Course Name	The name of the course associated to this fee, if any.
Payment Method	The method by which the student has paid for the fee. For more information, see *Payment Methods*.
Priority	The priority in which this fee is to be paid in respect to the other fee types. For more information, see *How to Rank Fee Types*.
Pro Rated	Indicates whether or not the fee is prorated. For more information, see *School Enrollment Fees* or *Course Enrollment Fees*.
Original Fee	The amount of the original fee.
YearID	The year in which the fee was created.
Group Transaction ID	If the fee was created using Fee Functions, a system-generated group transaction identification number appears. For more information, see *Fee Functions*.

How to View Transactions Associated with a Fee

Use this procedure to view transactions associated with a fee for a line item.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click the amount in the Paid column of the transaction line item you want to view. The Transactions page displays the following information:

Field	Description
Date	The date the transaction occurred. Click to view detailed information about the transaction record.
Time	The time the transaction occurred.
Type	The type of fee associated to the transaction.
Debit	The amount paid.
Credit	The amount overpaid.
Balance	The amount of the fee that the student owes.
Payment Method	The method by which the fee was paid.
Description	An explanation for creating the transaction.

How to View All Transactions

Use this procedure to view all transactions associated with a student for the current school and year.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **All Transactions**. The All Transactions page displays the following information:

Field	Description
Date	The date the transaction occurred. Click to view detailed information about the transaction record.

Time	The time the transaction occurred.
Type	Type of the transaction, such as **Payment** or **Refund**.
Starting Bal.	The student's balance before the transaction.
Amount	The amount of the transaction.
Net Effect	The student's balance after the transaction.
Method	The method of payment, such as **cash** or **check**.
Reference	Payment reference information entered during the transaction, if any. For example, if the student paid by check or credit card, the check number or credit card number may appear in this column.
Description	A brief explanation of the transaction.

How to View Fee Balances

Use this procedure to view global balances associated to a student for each school and year combination.

Note: Student fee balances can also be viewed in PowerTeacher as well as PowerSchool Parent if the **Do not show the lunch balance on parent/student pages** checkbox on the Miscellaneous district settings page is selected. For more information, see *Miscellaneous District Settings*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **Fee Balances**. The Fee Balances page displays the following information:

Field	**Description**

School	The school identification number.
Year	The current year.
Debit	The total amount the student owes.
Credit	The total amount the student is owed.
Balance	The difference between what the student owes and what is owed to the student.

How to Receive a Fee Payment

When a student's payment is received, use this procedure to enter the payment and have it distributed across all outstanding fees based on fee type priority, see *How to Distribute Payments*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Locate the fee for which you want to enter a payment.
4. Click **Payment** in the Transaction column. The New Transaction page appears.
5. Use the following table to enter information in the fields:

Field	Description
Transaction For	The fee type from which the fee was created appears, such as **Enrollment**. For more information about fee types, see *Fee Types*.
Course	The number used to identify the course appears. The information only displays if a course was associated to the fee.
Transaction Date	Enter the date of the transaction. The default is set to today's date.

	Note: If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Transaction Type	Choose the type of transaction you want to create from the pop-up menu: • **Payment** • **Credit** • **Void**
Description	Enter an explanation for creating the transaction.
Amount	Enter the amount of the payment. If the Transaction Type selected is **Void**, there is no need to enter a value in this field. The amount will be set by the fee balance. **Note:** If the payment is higher than the balance, the payment will be rejected.
Payment Method	Choose the method by which the payment is being made from the pop-up menu. For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

6. Click **Submit**. A confirmation message appears.

How to Distribute Payments

Use this procedure to enter a payment into the system and have it allocated across all outstanding fees based on fee type priority. For more information about fee type priority, see *How to Rank Fee Types*. To enter a payment for a selected fee, see *How to Receive a Payment*.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.
3. Click **Distribute** in the Transaction column. The Distribute Payment page appears.
4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the transaction. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for creating the transaction.
Amount	Enter the amount of the payment.
Payment Method	Choose the method by which the payment is being distributed from the pop-up menu. For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

5. Click **Submit**. A confirmation message appears.

How to Issue Refunds

Use this procedure to issue a refund. Refunds can be issued when the student's global balance is negative (the school owes money to the student). Refunds cannot be issued when the student's global balance is positive (the student owes money to the school) or null (global balance of zero).

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Fee Transactions** from the student pages menu. The Fee Transactions page appears.

3. Click **Refund**. The Refund page appears.
4. Use the following table to enter information in the fields:

Field	Description
Transaction Date	Enter the date of the refund. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for creating the refund.
Amount	Enter the amount of the credit.
Payment Method	Choose the method by which the credit is being made from the pop-up menu. For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

5. Click **Submit**. A confirmation message appears.

Log Entries

Use log entries to create a record regarding a student's behavior, performance, or activity. Many schools use log entries to chronicle disciplinary actions. Log entries can also be used to record students' positive achievements. Regardless of your reason for creating the log entry, the system immediately sends the log entry to the PowerSchool server, where it is stored in the student's permanent record. Only authorized staff members can view, add, edit, and delete log entries and discipline alerts.

Note: The Log Entries student page is customizable. The information presented in this section is based on the default setup and may differ from your PowerSchool Log Entries student page. For information about configuring this page, see *Log Types* and *Log Entry Fields*.

How to View Log Entries

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. If nothing appears, no teachers or other administrators have created log entries for the selected student.

How to Create a Log Entry

Though teachers can create log entries in PowerTeacher Gradebook, administrators create log entries in PowerSchool.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click **New**. The New Log Entry page appears.

   Note: The Date, Time, and Author fields are automatically entered when the page appears. There is no need to change or add anything to those fields unless they are incorrect.

4. Use the following table to enter information in the fields:

Field	Description
Date & Time	Enter the current date and time using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Author	Enter the name of the log entry author.
Log Type	Choose the log type from the pop-up menu.
Subtype	Choose the log subtype from the pop-up menu.
Consequence	Choose the log consequence from the pop-up menu.

Title	Enter a title for the log entry.
Log Entry Text	Enter the log entry text. **Note:** This information goes in the student's permanent record. There is no limit to the length of the entry.

5. Because the Log Entries student page can be customized, the fields that appear on the second half of the page (after the Log Entry Text box) may differ from your PowerSchool Log Entries student page. Use the following table to enter information in the fields:

Field	**Description**
Incident Type	Choose the type of incident from the pop-up menu.
Incident Type Category	Choose the category of the incident from the pop-up menu.
Incident Type Detail	Choose the details of the incident type from the pop-up menu.
Incident Date	Enter the date of the incident.
Incident Context	Choose the context of the incident from the pop-up menu. Indicate if the incident occurred during or outside school hours and if it occurred at a school-sponsored activity.
Incident Location	Choose the location of the incident from the pop-up menu. Indicate if the incident occurred on campus, during an off-campus school activity, or while using school-sponsored transportation.
Incident Location Detail	Choose the details of the incident location from the pop-up menu.
Offender	Choose the category of the person committing the incident, such as a **student** or **teacher**, from the pop-up menu.

Reporter	Choose the category of the person reporting the incident, such as a **student** or **teacher**, from the pop-up menu.
Reporter ID	Enter the identification number of the person reporting the incident.
Victim Type	Choose the category of the person victimized by the incident, such as a student or teacher, from the pop-up menu.
Felony Flag	Select **Yes** or **No** to indicate if the incident was a felony.
Likely Injury	**Select Yes or No** to indicate if the incident likely resulted in an injury.
School Rules Violation	Select **Yes** or **No** to indicate if the incident was a violation of school rules.
Police Involved	Select **Yes** or **No** to indicate if there were police involved in the incident.
Hearing Officer	Select **Yes** or **No** to indicate if there was a hearing officer involved in the incident.
Gang Related	Select **Yes** or **No** to indicate if the incident was gang-related.
Hate Crime	Select **Yes** or **No** to indicate if the incident was a hate crime.
Alcohol Related	Select **Yes** or **No** to indicate if the incident was alcohol-related.
Drug Related	Select **Yes** or **No** to indicate if the incident was drug-related.
Drug Type	Choose the drug type from the pop-up menu.
Weapon Related	Select **Yes** or **No** to indicate if a weapon was used during the incident.

Weapon Type	Choose the type of weapon, such as a **knife** or a **handgun**, from the pop-up menu.
Weapon Type Notes	Enter any notes related to the weapon type. **Note:** You can enter a maximum of 79 characters.
Money Loss Value	Enter any amount of money lost in the incident.
Action Date	Enter the date the discipline action was taken.
Action Taken	Choose from the pop-up menu the discipline action taken, such as **detention** or **suspension**.
Action Taken Detail	Choose the details of the discipline action taken from the pop-up menu.
Action Taken End Date	Enter the date the discipline action ended.
Duration (Assigned)	Enter the assigned duration of the discipline action, such as **2** for two hours of detention.
Duration (Actual)	Enter the actual duration of the discipline action.
Duration Change Source	Use the pop-up menu to choose the reason for any difference in the values of the Duration (Actual) from the Duration (Assigned) fields.
Duration Notes	Enter any notes related to the duration of the discipline action. **Note:** You can enter a maximum of 79 characters.
Sequence	Enter the numerical sequence of this log entry if entering more than one log entry for the incident.

Administrator ID	Enter the identification number of the person administering the discipline action.

6. Click **Submit**. The Changes Recorded page appears.

How to Edit a Log Entry

There are times when you must change an entry because it contains too much or not enough information. Only those school administrators with the proper permissions can edit a log entry.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click the date of the entry you want to edit. The Edit Log Entry page appears.
4. Use the following table to edit information in the fields:

Field	**Description**
Date & Time	Enter the current date and time using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Author	The name of the log entry author appears.
Log Type	Choose the log type from the pop-up menu.
Subtype	Choose the log subtype from the pop-up menu.
Consequence	Choose the log consequence from the pop-up menu.
Title	Enter a title for the log entry.
Log Entry Text	Enter the log entry text.

	Note: This information goes in the student's permanent record. There is no limit to the length of the entry.

See *How to Create a Log Entry* for details of the Federal Gun Safe Schools Act Information fields.

Note: Depending on your state, additional state-specific fields may appear. Modify the fields as necessary.

5. Click **Submit**. The Changes Recorded page appears.

How to Delete a Log Entry

Occasionally a log entry must be deleted from the student's permanent record. Only those school administrators with the proper permissions can delete a log entry.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click the date of the entry you want to delete. The Edit Log Entry page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Discipline Alert

Use a Discipline alert to indicate and make staff members aware of a student's discipline information.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Log Entries** from the student pages menu. The Log Entries page appears.
3. Click **Edit Discipline Alert**. The Discipline Alert page appears.
4. Use the following table to enter information in the fields:

Field	Description
Discipline Alert Text	Enter the discipline-related information.

Alert Expires	Enter the alert expiration date, if any, using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry. If there is no expiration date, use the default entry 0/0/0.

5. Click **Submit**. The Discipline Alert icon appears at the top of each page for the selected student. If the student does not have a Discipline alert, the icon does not appear.
6. Click the Discipline Alert icon to read the alert from any page. The Discipline alert for the selected student appears.
7. Click **Close** to close the Discipline Alert window.

Lunch

This menu item provides a quick view of a student's lunch status and account balance. If your school uses PowerLunch, any entries or changes made here appear in PowerLunch and vice versa. For additional information, see *PowerLunch*.

How to Edit Student Lunch Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Lunch** from the student pages menu. The Lunch page appears.
3. Use the following table to enter information in the fields:

Field	Description
Lunch status	Choose the lunch status from the pop-up menu.
Application #	Enter or change the number of the student's application for free or reduced price lunches.
Date Submitted	Enter or change the date the student's application was submitted using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

Date Responded	Enter or change the date of the response to the student's application using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Lunch ID	Enter or change the lunch ID number.
Current balance	The current balance appears.

4. Click **Submit**. The Changes Recorded page appears.

Lunch Transactions

This page displays the lunch balance and payment activity for the selected student. You can enter the student's initial deposit for meals, as well as subsequent deposits other than those made when the student passes through the lunch line. If your school uses PowerLunch, this page links to the information entered in that area of PowerSchool. For more information about this option, see *PowerLunch*.

If the balance next to the last line item on the Lunch Transactions page does not match what's in the Balance field, you may need to recalculate that student's lunch balance. For more information, see *How to Recalculate a Student's Lunch Balance*.

When a student's lunch balance falls below a designated level, a Balance alert appears for the student. For Balance alert setup information, see *Balance Alert*.

How to Enter Lunch Transactions

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Lunch Transactions** from the student pages menu. The Lunch Transactions page appears.
3. Click **New**. The Transaction Record page appears.
4. Use the following table to enter information in the fields:

Field	**Description**

Transaction Date	If the transaction does not take place today, enter a different transaction date using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter a description of the transaction.
Amount of Fee	Enter any amounts charged to the student.
Amount of Credit	Enter any amounts credited to the student.
Tender Type	Select the appropriate option to indicate the form of payment: • **Cash** • **Check**

5. Click **Submit**. The Changes Recorded page appears.

How to View the Balance Alert

Note: The student's lunch balance may become out of sync with the running balance if manual changes are made to student meal service records outside of PowerLunch, such as DDA. An error is displayed in these scenarios. Click the link to force a recalculation of the student's lunch balance.

1. On the start page, search for and select a student. For more information, see *Student Search*. A Balance Alert icon appears if the student's account balance is below the designated level.
2. Click the **Balance Alert** icon. The Balance Alert page appears.

Net Access

Use this view-only option to track the number of times a parent, guardian, or student logs in to PowerSchool. The Summary page tells how many times a family has checked on the student's progress via the Internet and the date of each sign in. The amount of time spent reviewing the information also appears.

How to View Net Access Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Net Access** from the student pages menu. The Net Access page appears.

   For parents who have accessed the student’s academic record, the following information displays: Date, Time, Parent, IP and Duration.

   For students who have accessed their own academic record, the following information displays: Date, Time, Student Name, IP and Duration:

SEOP Review

Use this function to review and track Student Education Occupation Plan (SEOP) information. The purpose of the SEOP review is to recognize student accomplishments and strengths. In the SEOP review, the student and his or her parents meet with school counselors and other school personnel to develop a strategy to plan and manage the student's education and career development.

Your school's SEOP Review page might differ from the example. The page can be modified or updated by PowerSchool per your request. Contact your PowerSchool administrator about making changes to the SEOP Review page.

How to View SEOP Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **SEOP Review** from the student pages menu. The SEOP Review page appears.
3. Click the various links to determine what actions can be executed from this page.
4. Click your Web browser's Back button until you return to the SEOP Review page.

Incident Data Grid

The Incident Data Grid is the central point from which you can quickly and easily view incidents for your school or district, as well as create a customized search filter to locate specific existing incidents. When signed in to at the school level, you can view incidents that include a participant from that school or incidents that originated at that school for the assigned incident code types. When signed in to at the district level, you can view incidents at all schools for the assigned incident code types.

Note: Information on this page displays based on your security settings.

How to Search for a Student's Existing Discipline Incidents

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Administration, choose **Incidents** from the student pages menu. The Incident List page appears for that student.
3. To continue, see Step 3 of *How to Search for Existing Discipline Incidents*.

How to Search for Existing Discipline Incidents

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Incident Management**. The Incident List page appears.
3. Use the following table to enter information in the Incident Information section:

Field	Description
Time Frame	Use the pop-up menu to indicate the time frame for which you want to view incidents: • **Current Calendar Year** (appears if at district level) • **Current School Year** (appears if at school level) • **Prior Calendar Year** (appears if at district level) • **Prior School Year** (appears if at school level) • **Current Month** • **Prior Month** • **Current Week** • **Prior Week** • **Date Range** • **Specific Date** **Note:** At the school level, the default is set to **Current School Year**. At the district level, the default is set to **Current Calendar Year**. If **Date Range** is selected, enter or select a **Start Date** and **End Date** and then click **Apply**.

<table>
<tr><td></td><td>If Specific Date is selected, enter or select a date and then click Apply.</td></tr>
<tr><td>Incident Element</td><td>Use the pop-up menu to indicate the way in which you want to view incident counts:

Action
Behavior
Custom

To customize your Incidents Counts by Action view:

Choose Action from the pop-up menu.
Click the button next to the pop-up menu. The Edit Tile Configuration section appears.
For each tile you want to customize, choose one of the following:

Hide - Removes the tile from the view. The next time the view is accessed, the tile will not appear.
Any to filter by a code and its subcodes
A single subcode

Click Save.

Note: Click Cancel to cancel customizations. Click Reset Defaults to delete customizations.

To customize your Incidents Counts by Behavior view:

Choose Behavior from the pop-up menu.
Click the button next to the pop-up menu. The Edit Tile Configuration section appears.
For each tile you want to customize, choose one of the following:

Hide - Removes the tile from the view. The next time the view is accessed, the tile will not appear.
Any to filter by a code and its subcodes
A single subcode

Click Save.

Note: Click Cancel to cancel customizations. Click Reset Defaults to delete customizations.
</td></tr>
</table>

	To customize your Incidents Counts view: 1. Choose **Custom** from the pop-up menu. 2. Click the button next to the pop-up menu. The Edit Tile Configuration section appears. 3. For each tile you want to customize, choose one of the following: • **Hide** - Removes the tile from the view. The next time the view is accessed, the tile will not appear. • **Action** • **Behavior** 4. If **Action** or **Behavior** is selected, choose one of the following from the second pop-up menu: • **Hide** - Removes the tile from the view. The next time the view is accessed, the tile will not appear. • **Any** to filter by a code and its subcodes • A single subcode 5. Click **Save**. **Note:** Click **Cancel** to cancel customizations. Click **Reset Defaults** to delete customizations.
[Incident Category]	The tiles display the top ten counts for each incident category. Click a tile to switch to that filter. Click again to remove that filter. **Note:** Incident category tiles appear in alphabetical order.
Create New Incident	Click to create a new incident. For more information, see *How to Create a Discipline Incident.*

4. Use the following table to enter information in the Filter section:

   Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	**Description**
[Incident Element]	The first row of the filter displays the action or behavior based on the selected tile. This indicates that the incidents currently on

	display in the grid have at least one related matching action or behavior.
ID	To further narrow the list of incidents by the ID: 1. Click the **Add (+)** button. 2. Choose **ID** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Enter the entire ID number of the incident in the search field. Partial IDs cannot be entered. 5. Click **Apply**.
Title	To further narrow the list of incidents by the title: 1. Click the **Add (+)** button. 2. Choose **Incident Title** from the first pop-up menu. 3. Enter the title of the incident or incidents in the search field. Partial titles can be entered, which do not require a wild character. 4. Click **Apply**.
Incident Type	To further narrow the list of incidents by the incident type: 1. Click the **Add (+)** button. 2. Choose **Incident Type** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Choose an incident type from the third pop-up menu. 5. Click **Apply**.
Incident Location	To further narrow the list of incidents by the incident location: 1. Click the **Add (+)** button. 2. Choose **Incident Location** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Choose an incident location from the third pop-up menu. 5. Click **Apply**.

<table>
<tr><td>School</td><td>To further narrow the list of incidents by the school:

1. Click the Add (+) button.
2. Choose School from the first pop-up menu.
3. Choose a school from the second pop-up menu.
4. Click Apply.

Note: This filter only appears at the district level.

Note: If field level security has been applied to School, this filter option is not available.</td></tr>
<tr><td>Action</td><td>To further narrow the list of incidents by the action:

1. Click the Add (+) button.
2. Choose Action from the first pop-up menu.
3. Choose one of the following from the second pop-up menu:
• Any to filter by a code and its subcodes
• A single subcode
4. Click Apply.</td></tr>
<tr><td>Attribute</td><td>To further narrow the list of incidents by the attribute:

1. Click the Add (+) button.
2. Choose Attribute from the first pop-up menu.
3. Choose one of the following from the second pop-up menu:
• Any to filter by a code and its subcodes
• A single subcode
4. Click Apply.</td></tr>
<tr><td>Behavior</td><td>To further narrow the list of incidents by the behavior:

1. Click the Add (+) button.
2. Choose Behavior from the first pop-up menu.
3. Choose one of the following from the second pop-up menu:
• Any to filter by a code and its subcodes</td></tr>
</table>

<table>
<tr><td></td><td>A single subcode
4. Click Apply.</td></tr>
<tr><td>Current Grade Level</td><td>To further narrow the list of incidents by the current grade level:
Click the Add (+) button.
Choose Current Grade Level from the first pop-up menu.
Choose a grade level from the second pop-up menu.
Click Apply.</td></tr>
<tr><td>Object</td><td>To further narrow the list of incidents by the object:
Click the Add (+) button.
Choose Object from the first pop-up menu.
Choose one of the following from the second pop-up menu:
Any to filter by a code and its subcodes
A single subcode
Click Apply.</td></tr>
<tr><td>Participant: Any</td><td>To further narrow the list of incidents by the any participant of the incident:
Note: If the Current Grade Level filter has been applied, participants are limited to only students.
Click the Add (+) button.
Choose Participant: Any from the first pop-up menu.
Enter the name or a portion of the participant's name.
Click Apply.
Note: Format must be Last, First.</td></tr>
<tr><td>Participant: Offender</td><td>To further narrow the list of incidents by the incident offender:
Note: If the Current Grade Level filter has been applied, participants are limited to only students.
Click the Add (+) button.</td></tr>
</table>

	2. Choose **Participant: Offender** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.
Participant: Reporter	To further narrow the list of incidents by the incident reporter: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Reporter** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.
Participant: Victim	To further narrow the list of incidents by the incident victim: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Victim** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**. **Note:** Format must be Last, First.
Participant: Witness	To further narrow the list of incidents by the incident witness: **Note:** If the **Current Grade Level** filter has been applied, participants are limited to only students. 1. Click the **Add (+)** button. 2. Choose **Participant: Witness** from the first pop-up menu. 3. Enter the name or a portion of the participant's name. 4. Click **Apply**.

	Note: Format must be Last, First.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

5. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	**Description**
[Checkboxes]	Do one of the following: • Select the checkbox in the header row to select all incidents. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all incidents. • Select the checkbox for each incident you want to work with.
ID	Unique sequential number generated by PowerSchool when the incident is created. Click to view the Incident Detail page.
Title	A short description of the incident. Click to view the Incident Detail page.
Incident Type	The type of incident that occurred.
Incident Date	The date and time the incident occurred.
Incident Location	The location where the incident occurred.
School	The school at which the incident occurred. **Note:** This column only appears at the district level. **Note:** If field level security has been applied to School, this column appears masked.

[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.
Download	To download the incident information, click the arrow and select one of the following from the pop-up menu: • **Comma-Separated Value (CSV)** • **Excel Spreadsheet (XLSX)** • **Print Document Format (PDF)** **Note:** A checkmark appears next to your selection. **Note:** The PDF format is restricted to a maximum of 1000 records. **Note:** Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format. **Note:** If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language.

6. Use the following table to update the current student selection:

Field	Description
Select Participants with These Roles	1. Select one of the following checkboxes: • **Any Role** • **Offender** • **Reporter** • **Victim** • **Witness** 2. Do one of the following: • Click **Add to Current Selection** to add the filtered list of students to your current student selection.

	• Click **Set Current Selection** to make the filtered list of students your current student selection.

Enrollments

Activities

Use the Activities function to view and manipulate extracurricular activities on two different levels. Add or delete an activity from an individual record. Alternatively, add or delete an activity from the PowerSchool system that can be applied to any or all records.

How to Add Activities on a Student Record

This action adds or deletes an activity to a specific student record. It affects the selected student only.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Activities** from the student pages menu. The Activities page appears. Selected checkboxes indicate that the student participates in that activity. Deselected checkboxes indicate that the student does not participate in that activity.
3. Select the checkboxes to add activities to the student's record.
4. Click **Submit**. The Changes Recorded page appears.

How to Delete Activities on a Student Record

This action adds or deletes an activity to a specific student record. It affects the selected student only.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Activities** from the student pages menu. The Activities page appears. Selected checkboxes indicate that the student participates in that activity. Deselected checkboxes indicate that the student does not participate in that activity.
3. Deselect the checkboxes to remove activities from the student’s record.
4. Click **Submit**. The Changes Recorded page appears.

All Enrollments

This page displays the selected student's enrollment history. It is most often used by counselors reviewing the student's entry and exit dates to previous and current classes. Counselors and other school administrators can view assignments for the classes listed and any teacher comments. Data saved from PowerTeacher immediately a part of the student's current record and is subject to change by the teacher. At the end of the term these grades are stored into an historical grades table at which point only certain school administrators, such as counselors, can edit these stored records. For more information, see *Work with Student Schedules*.

How to View Grades and Assignments

Use this option on the All Enrollment page to view grades and assignments for any class in which the student has been enrolled.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **All Enrollments** from the student pages menu. The All Enrollments page appears.

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. Not applicable for View and Edit columns.

3. Click **View** next to the class that you want to view. The Scores page displays the assignments that make up the class and the grades the student received on each assignment. You can also view this page by clicking on a score on the Quick Lookup page. For more information, see *How to View Student Assignment Scores*.

   Note: Assignments created in PowerTeacher Pro are noted on the Scores page.

   Note: This page is view-only for all users. To edit a record, see *How to Edit an Enrollment Record*.

How to Edit an Enrollment Record

View or edit course enrollment dates and teacher comments on the All Enrollments page.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **All Enrollments** from the student pages menu. The All Enrollments page appears.

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. Not applicable for View and Edit columns.

3. Click **Edit** next to the class that you want to edit. The Edit Enrollment Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
Student	The name of the selected student appears.
Course	The name of the selected course appears.
Teacher	The name of the selected teacher appears.
Expression	The name of the selected schedule expression appears.
Enroll Date	Enter the first day the student's enrollment is effective. An entry is only valid if: • The date entered is on or after the first day of the term, and; • Is less than the last day of the term. When entering date, us the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the first day the student's enrollment is no longer effective. An entry is only valid if: • The student has already been dropped from the class, and; • The date entered is after the first day of the term and not past the last day of the term. **Note:** If the student has not already been dropped from the class, you can use the **Drop Students** or

	Drop Students and Reschedule functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page. When entering date, use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
[Message]	A message appears indicating that the Edit Enrollment Record pop-up cannot be used to drop a student from the class. To drop a student from the class, use the **Drop Students** or **Drop Students and Reschedule** functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page.
[State-specific]	Enter state-specific information, as needed.
Clean up overlapping enrollments	If the student has overlapping enrollments in a single section, this link appears. Click to access the Clean Up Overlapping Section Enrollments page.

5. Click **Submit**. The All Enrollment Records page appears.

Delete Enrollment Records

Use this option to delete all enrollment records for an individual student. It is likely that only a limited number of people at your school have permission to perform this procedure. For information about editing enrollment records, see *Transfer Info*.

How to Delete Enrollment Records

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Under Previous Enrollments, click the entry date of the record you want to delete. The Edit Previous Enrollment page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Special Programs

Create special programs in PowerSchool and enter students into those programs. Examples of special programs include vocational, resource, home school, or any type of program where students are not in mainstream classes. This function also helps schools keep track of how many students receive state funding for participating in special programs.

To simultaneously enroll more than one student into a special program, see *How to Mass Enroll Students in a Special Program*.

Note: Prior to 10.1.1, when adding a student to a program, a value of 0 was stored in the SpEnrollments.ID column. Now, a unique numeric value is stored to that column. To generate a unique ID for SpEnrollments records with ID = 0, run the Set Special Program Enrollment ID function via **System > Special Operations**. No code or password is required to run it.

How to View Special Programs

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.

The chart tells you in which programs the student participates, date of the student's entry into the program, exit date, and exit code indicating why the student left the program. Links to the program name and entry date provide more details on these items. If there is no program noted at the top of the page, the selected student does not participate in a special program.

How to Add a Student to a Program

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.
3. Click **New**. The New Special Program Enrollment page appears.
4. Use the following table to enter information in the fields:

Field	Description

Comment	Enter any notes related to the student's participation in the special program (optional).
Entry Date	Enter the date the student entered the program using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the exit date (optional), which is the first day the student was not active in the program. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Reason	Enter the code that describes why the student exited the program (optional).
Program	Choose the program from the pop-up menu. **Note:** For more information about the listed programs, click **Program**.

5. Click **Submit**. The Changes Recorded page appears.

How to Edit a Student in a Program

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.
3. Click the student's entry date for the program you want to edit. The Edit Special Program Enrollment page appears.
4. Edit the information as needed. For field description, see *How to Add a Student to a Program*.
5. Click **Submit**. The Changes Recorded page appears.

How to Delete a Student From a Program

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.
3. Click the student's entry date for the program you want to delete. The Edit Special Program Enrollment page appears.
4. Click **Delete** to delete the student from the program. The Changes Recorded page appears.

How to Mass Enroll Students in a Special Program

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Enrollment, choose **Mass Enroll Special Program**. The Mass Enroll Special Program page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Program	Choose the special program into which you want to enroll the selected students from the pop-up menu.
Entry Date	Enter the date the students entered the program using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the exit date (optional), which is the first day the student was not active in the program. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

Exit Code	Enter the code that describes why the students exited the program (optional).
Comment	Enter any comments related to the student's participation in the special program. The comment appears on the Special Programs student page for each student.

5. Click **Submit**. The Alert page displays the message "Mass enroll successful."

Student Functions

Use the Functions link to perform various important actions to an individual student record.

How to Perform Student Functions

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment. choose **Functions** from the student pages menu. The Functions page appears.
3. Use the following table to perform various student function:

Field	**Description**
Print Reports For This Student	Use this option to print a report. For more information, see *Run, Print, and Save Reports*.
Transfer Out Of School	Use this option to transfer students out of your school. For more information, see *Transfer Students*.
Re-Enroll In School	Use this option to reenroll a student in your school after he or she has left. For more information, see *How to Reenroll in School*.
Transfer To Another School	Use this option to transfer a student to another school after you have transferred the student out of your school. For more information, see *Transfer Students*.

Enroll Student in Remote/Summer School Class	Use this option to enroll a student in a remote/summer school class. For more information, see *How to Enroll a Student in a Remote/Summer School Class*.
Create New School Enrollment	Use this option to create a new school enrollment record without transferring the student in or out of school. For more information, see *How to Create a New School Enrollment*.
On-Screen Transaction Report	Use this option to access a view-only page of the student's meal account activities. For additional information on serving meals and account maintenance, see *PowerLunch*.
Recalculate Lunch Balance	Use this option to recalculate a student's meal account balance. For additional information on serving meals and account maintenance, see *PowerLunch*. **Note:** To avoid students' current and running balances not matching, be sure to import last year's lunch balances into the Current Balance field ([Student]Balance1) instead of the running balance field ([Student]Balance2). If one student's current and running balances do not match, use Direct Database Access to modify the current balance to match the running balance. Alternatively, use the Recalculate Lunch Balances function to match all students' current balances with their running balances. For more information, see *Direct Database Export* and *Special Operations*.
Enroll New Student Living in the Same Household	Use this option to enroll a new student by copying information from an existing student record. For more information, see *How to Enroll a New Student Living in the Same Household*.

Transfer Information

This page displays the student's history of transfers into and out of your school. Use the Transfer Info function for viewing or editing information that was previously entered through the Functions page. Do not use this page to transfer a student. For instructions on transferring students, see *Transfer Students*.

You can add, edit, or delete entry codes and exit codes from the student pages menu. For more information about an alternative method for adding, editing, or deleting these codes, see *Entry Codes* and *Exit Codes*. You can also edit the options in the District of Residence pop-up menu. For more information, see *Districts of Residence*.

Note: Field level security may be used to restrict this information on the Transfer Information page (with the exception of C_REENROLLMENTSOUTOFDISTRICT.DISTRICTNAME, C_REENROLLMENTSOUTOFDISTRICT.SCHOOLNAME, and REENROLLMENTS.SCHOOLID). For more information, see *Field Level Security*.

How to View Transfer Information

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.

   The resulting page displays the student's current enrollment information at the top. The student's previous enrollment information appears next. The columns show the date the student entered a school, an exit date if the student left, the student's grade level when the transfer occurred, any entry or exit comments made by the administrator who completed the transfer, and the school from which the student exited. If a blank chart appears on the page, the selected student has not transferred into or out of your school.

How to Edit Enrollment Information

Perform this action to change the enrollment record of an individual student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of the record you want to edit. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Use the following table to enter information in the fields:

   Note: Fields vary slightly from the Edit Current Enrollment to the Edit Previous Enrollment page.

Field	Description
Entry Date	Enter the date the student was enrolled using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Entry Code	Choose a reason for the transfer from the pop-up menu.
Entry Comment	Enter any comments related to the entry transfer.
Exit Date	Enter the exit date, which is the first day the student's enrollment is not active or the day after the student transferred out. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Code	Choose a reason for the transfer from the pop-up menu.
Exit Comment	Enter any comments related to the exit transfer.
Full-Time Equivalency	FTE is a grouping that associates a student's school enrollment with a set of attendance conversion values. When ADA runs, for a student, it runs for each school enrollment during the report dates. When processing each school enrollment, it uses the student's FTE to locate the set of attendance conversions to use when looking up the attendance value for the day. For more information, see *Full-Time Equivalencies*. Choose the student's FTE from the pop-up menu for this school enrollment.
Grade Level	Choose the student's grade level at the time of the transfer from the pop-up menu.
Track	Choose the student's track from the pop-up menu. For more information, see *Calendar Setup*.

District of Residence	Choose the district in which the student lives from the pop-up menu. For more information, see *Districts of Residence*.

5. Click **Submit**. The Changes Recorded page appears.

   Note: When you edit an enrollment record, the enrollment is validated before saving. An alert appears if there are any problems, such as blank field values.

How to Add a Transfer Code

Create a new entry or exit code on the PowerSchool system. Anyone who manages student transfers can apply this code to any student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of any record. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Click **Entry Code** or **Exit Code**, depending on your needs. The Entry Codes or Exit Codes page appears.
5. Click **New**. The Edit Entry Codes or Edit Exit Codes page appears.
6. Use the following table to enter information in the fields:

Field	Description
Code	Enter the code.
Meaning	Enter a description of the code.
Sort Order	Enter the sort order of the exit code as it appears in pop-up menu on the student pages.

7. Click **Submit**. The Entry Codes or Exit Codes page displays the new code and its meaning. Any authorized user can apply the new code to any student transferring into or out of your school.

How to Edit a Transfer Code

Any changes you make to a code will affect everyone who manages transfers. You may want to discuss changes with other users before making them.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of any record. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Click **Entry Code** or **Exit Code**, depending on your needs. The Entry Codes or Exit Codes page appears.
5. Click the code or the meaning of the code you want to edit. The Edit Entry Codes or Edit Exit Codes page appears.
6. Edit the information as needed. For field descriptions, see *How to Add a Transfer Code*.
7. Click **Submit**. The Entry Codes or Exit Codes page displays the edited code and its meaning. Any authorized user can apply the edited code to any student transferring into or out of your school.

How to Delete a Transfer Code

Any changes you make to a code affects everyone who manages transfers. You may want to discuss changes with other users before making them. For information about deleting transfer information for previous student enrollments, see *Delete Enrollment Records*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Transfer Info** from the student pages menu. The Transfer Information page appears.
3. Click the entry date of any record. The Edit Current Enrollment or Edit Previous Enrollment page appears.
4. Click **Entry Code** or **Exit Code**, depending on your needs. The Entry Codes or Exit Codes page appears.
5. Click the code or the meaning of the code you want to delete. The Edit Entry Codes or Edit Exit Codes page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Delete page appears.

Scheduling

Student Schedule

There are three ways to display a student's schedule. The Bell Schedule View displays the student's schedule for the current week. The List View displays the student's schedule for the selected term in a list format. The Matrix View displays the student's schedule for the selected term in a graphical format.

How to View a Student's Bell Schedule

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Bell Schedule View** from the student pages menu. The Bell Schedule View page displays the student's schedule for the current week, using unique colors to distinguish each course.
3. Click the **Section Teachers** icon next to the teacher's name to view the teachers assigned to the class. The Section Teachers pop-up appears.

   Note: This icon appears only if there is more than one teacher assigned to the class.

4. When done viewing, click the **x** to close the Section Teachers pop-up.

How to View a Student's Schedule (List View)

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **List View** from the student pages menu. The Schedule List View page displays the student's schedule for the currently selected term.

   The following information appears for each line item: schedule expression, term, course number, section number, course name, teacher, room number, enrollment date, and exit date.

3. To change terms, click the term link. The Change Term page appears. Use this page to select a different term in which to view the student's schedule.
4. To view the student's schedule by each term within the selected term, click **Entire Year Schedule**. The Entire Year Schedule page displays the student's schedule for the entire year by terms, such as quarter and semester.

How to Display a Student's Schedule (Matrix View)

The schedule matrix graphically represents a student's schedule for all days, periods, and terms in the selected year for the current school.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Matrix View** from the student pages menu. The Schedule Matrix View page appears.

   The schedule matrix view displays the student's schedule for each period and day in each term. Identical colors on the schedule indicate the same course. A blank block means that nothing is scheduled for that block in that term. Each block can include the following information, depending on the matrix display preferences: course name, course number, section number, teacher name, room number, expression (the combination of periods and days), and year term.

   For more information about the student schedule matrix preferences, see *Miscellaneous System Administration*.

Course Requests and Schedule

In PowerSchool, you create and maintain a primary class schedule for each student in your school. Throughout the year, you might need to make schedule changes for existing students or create new schedules for students who enroll at your school during the year. There are two ways to maintain student schedules: manual scheduling and auto-scheduling. Manual scheduling is section-specific and allows you to pick specific sections in which to enroll the student, overriding the system-defined schedule if one exists. Auto scheduling is course-specific. You enter a student's request for specific courses. The system then automatically schedules the student for the sections that best fits his or her schedule.

Note: Maintaining student schedules can be done in conjunction with Scheduler or independently.

How to Access the Modify Schedule - Enrollments Page

Use this page to modify the student's schedule. The page is divided into two functional areas: Enrollments and Requests. By default, the Enrollments tab is selected. The Modify Schedule - Enrollments page displays the student's section enrollments for the current year and school, as well as current course requests.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears. The following information is either captured as part of the PowerScheduler commit process or can be manually defined:

Field	**Description**
Enrollments	By default, the Enrollments tab is selected, which displays the student's section enrollments for the current year and school, as well as current course requests.
Requests	The second tab on the Modify Schedule page is Requests. The Modify Schedule - Requests page supports editing and entering course requests for the student. It is these requests that the scheduling engine uses to determine the students schedule. For detailed information, see *How to Access the Modify Schedule - Requests Page*.
View Entire Year Schedule	Click to view the student's schedule by each term within the selected term.
Edit Auto Schedule Parameters	Click to display the Automated Scheduling Setup page to modify default parameter settings for this scheduling session.
Functions	Click the arrow to expand this section. Click the arrow again to collapse this section. When creating a new section enrollment, enter the date that any enrollment becomes effective in the **Effective Enrollment Date** field. The field defaults to tomorrow's date, unless: • It is before the section's start date, in which case the start date defaults to the start date of the section, according to the term and schedule day on the school calendar. • It is after the section's start date but during an off-cycle day, in which case the start date defaults to the next valid schedule day for the section. Use **Search Available Classes** to enroll the student into a course:

<table>
<tr>
<td></td>
<td>

Course Number - Use as a filter to search for available sections.
Period - Use as filter to search for available sections.
Find - Click to search for available classes.

Use Quick Enroll to enroll the student into a section:

Course.Section - Use to search for a section and enroll the student immediately into the section.
Enroll - Click to initiate search/enroll.

</td>
</tr>
<tr>
<td>Enrollments</td>
<td>
The following information appears for each line item:

Exp - The period and day combination of the course.
Trm - The term in which the course is being taught.
Crs-Sec - The course and section number used to identify the course.
Click the Section Teachers icon next to the teacher’s name to view the teachers assigned to the class. The Section Teachers pop-up appears. When done viewing, click the x to close the Section Teachers pop-up.
Course Name - The name of the course.
Note - Prerequisites pertaining to the course, if any. For more information, see Course Prerequisites.
Teacher - The name of the teacher teaching the course.
Room - The room number in which the course is taught.
Enroll - The first day the student's enrollment is active.
Leave - The first day the student's enrollment is not active.

Note: The Section Teachers icon appears only if there is more than one teacher assigned to the class.
Use the following information to lock or drop the student's section enrollments:
Note: If the Effective Enrollment Date is set to a date that is after the Leave date for an enrollment, then that enrollment is locked and cannot be adjusted. If the course is in the future or in progress, then you can lock/unlock as needed.
</td>
</tr>
</table>

	• **Lock** - Click the **Lock** icon (appears unlocked) next to each section enrollment that should not be changed by the scheduling engine, if any. For instance, if you want the student to remain in Algebra for period 1 on MWF, select the **Lock** icon for that section enrollment. • **Unlock** - Click the **Lock** icon (appears locked) next to each section enrollment that should be changed by the scheduling engine, if any. • **Toggle Locks** - Click to lock or unlock all section enrollments. • **Drop** - Delete enrollments individually and immediately by selecting the checkbox next to the section enrollment you want to delete and clicking **Drop Selected**. The Drop Classes page appears. Verify the information you want to delete. Enter an exit date and click **Drop Classes**. The exit date is the first day the student's enrollment is not active. Use the format mm/dd/yyyy or mm-dd-yyyy. • **Drop All** - Click to immediately drop all the current section enrollments for the student. The Drop Classes page appears. Verify the information you want to delete. Enter an exit date and click **Drop Classes**. The exit date is the first day the student's enrollment is not active. Use the format mm/dd/yyyy or mm-dd-yyyy. • **Automated Schedule** - Use to initiate the automated scheduling process that uses the scheduling engine to produce the student's schedule. • **Manually Schedule Student** - Use to manually schedule the student into available courses by period.
Course Requests	Use to view the student's current course requests. For detailed information, see *How to Access the Modify Schedule - Requests Page*.

How to View Entire Year Schedule

Use the Entire Year Schedule link to view the student's schedule by each term within the selected term.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **View Entire Year Schedule**. The Entire Year Schedule page displays the student's schedule for the entire year by terms, such as quarter and semester.

How to Edit Auto Schedule Parameters

Use Edit Auto Schedule Parameters to modify default parameter settings for this scheduling session. The defaults for these values are defined via **Start Page > School Setup > Scheduling Preferences**. It is often useful to be able to override the default values just for the current scheduling attempt.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Edit Auto Schedule Parameters**. The Edit Auto Schedule Parameters page appears.
4. Use the following table to edit the information in the fields:

Field	Description
Use buildings	Select the checkbox if this scenario uses buildings.
Use houses	Select the checkbox if this scenario uses houses.
Close sections at maximum	Select the checkbox to ensure that courses close at their maximum enrollment numbers.
Use global course substitutes	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use student course substitutes	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.
Percent of schedule combinations to	The default value of this field is 10. Change this value only if you encounter problems with the amount of time the system is using

evaluate for each student	to build the master schedule. For example, if you enter 25, the system evaluates one-quarter of the possible schedule combinations for each student. If you enter 75, the system evaluates three-quarters of the possible schedule combinations for each student.
Minimum number of schedule combinations to evaluate before skipping	The default value of this field is 10,000. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. Entering a high number forces the system to sample a minimum number of student schedule course possibilities.

5. Click **Submit**. The Changes Recorded page appears.

How to Modify a Student's Schedule Using Automated Walk-In

With Automated Walk-In Scheduling, you no longer need to manually create schedules for students who have enrolled in school after the initial scheduling process has been completed. Instead, you can leverage the existing scheduling engine, which determines the most optimal schedule for the student automatically.

In a typical scenario for a school during the first week of a new school year, many students either do not have a schedule or need to revise their previously-created schedule. These students are sent to a counselor who often has many other students waiting to work on their schedule. It can be very frustrating for the counselor to have to manually find open sections in the master course schedule and try to create a schedule that works best for the student.

With Automated Walk-In Scheduling, PowerSchool automatically determines the most optimal schedule for the student while considering the many rules and constraints concerning the student and schedule, such as load constraints, course relationships, enrollment constraints, and section types. Additionally, you can select to schedule by team, house, or building. All this can be done while locking existing section enrollments to preserve those records yet schedule additional requests. Counselors then choose to accept or reject the schedule returned by the engine before it is made permanent.

The following functional flow describes the basic course of events to perform to successfully create a new schedule for an individual student or modify an existing schedule for an individual student within PowerSchool.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Enter the date the enrollment becomes effective. The default is set to today's date.

   Note: If any attendance records for the student exist before the new entry date or after the new exit date, an error message will appear. To modify attendance, see *Meeting/Interval Attendance*.

4. Before continuing, you can lock or drop student's section enrollments. For detailed information, see **Enrollments** in the *How to Access the Modify Schedule - Enrollments Page* field description table.
5. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

6. Click **New**. The Create Course Request [student name] page appears.
7. Click **Associate** to select the name of the course. The Associate Course page appears. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. When done selecting courses, click **Okay**.
8. Click **Submit**. The Modify Schedule - Requests page appears, which now reflects the new requests.
9. Modify the requests by identifying which ones are alternate requests and assigning priorities or associating one alternate course for the primary requests.
10. Click **Submit**. The Modify Schedule - Requests page refreshes.
11. Click **Enrollments**. The Modify Schedule - Enrollments page appears.
12. Click **Automated Schedule**. The information is exported to the scheduling engine. The scheduling engine creates the most optimal schedule for the student based on the students course requests, load constraints, course relationships and applicable scheduling parameters. The results are then imported from the scheduling engine.

    Once the engine determines a schedule for the student, the Automated Schedule Results page appears. The page displays any error messages, enrollments, and course requests. At this point, the results have not become the permanent schedule for the student. The results can only be accepted or rejected in whole.

    Note: You can always modify the schedule by dropping and adding enrollments via the Modify Schedule page.

13. Do one of the following:
    - If the results are unacceptable, click **Discard** to clear the results. The Modify Schedule - Enrollments page displays the original schedule.

- If the results are acceptable, click **Accept**. The Modify Schedule - Enrollments page displays the new schedule.

How to Manually Modify a Student's Schedule

The schedule list view displays the student's schedule for the currently-selected term. Use this page to manually schedule students after viewing available courses by period.

Additionally, you can add or drop sections from a student's schedule using the Enroll and Drop pop-up menus. For more information about these topics, see *Add Sections* and *Drop Sections*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Manually Schedule Student**. The Manually Schedule Student page appears.
4. Use the following table to edit the information in the fields:

Field	Description
Enroll Date	Enter the date to indicate when the student enrolled in the selected courses. **Note:** If any attendance records for the student exist before the new entry date or after the new exit date, an error message will appear. To modify attendance, see *Meeting/Interval Attendance*.
Number	The course number appears.
Course Name	The course name appears.
Term	The term in which the course occurs appears.
Day	The day(s) on which the course occurs appears. Hover over the checkbox to display the following: • Course number and section ID [course.section]. • Number of seats enrolled and seats available [seats enrolled/seats available].

	• List of all teachers associated to the section, sorted by role. **Note:** A day (or "cycle") is the number of repeating days that make up a schedule.
Period	Select the checkboxes next to the course, term, and expression in which you want to enroll the student. Deselect the checkboxes next to the course, term, and expression from which you want to drop the student. To view the Course Number, Teacher Name, and Enrollment Count, hover over the checkbox. **Note:** The student's currently scheduled classes appear in gray, available classes in green, and full classes in red. If an expression is gray and has a selected checkbox, the student is in the class. An asterisk (*) notation means that the class is full, regardless of color.
Enter a password for maximum enrollments override	If enrolling the student in a full class, enter the password to override the maximum enrollment in the field at the bottom of the page.

5. Do one of the following:
    - Click **Submit** to submit your changes. The Manually Schedule Student page appears.
    - Click **Continue**. The Modify Schedule - Enrollments page appears.
    - Click **Reset** to refresh the page to display the last saved selections.

How to Access the Modify Schedule - Requests Page

The Modify Schedule - Requests page supports editing and entering course requests for the student. Requests are what the engine uses to determine the student's schedule. The student will not be scheduled for any course that is not requested. The exception to this are locked enrollments, which will be kept even if a request does not exist for the course.

Although you can still enter requests through the Requests Modify Current and Requests Modify Future pages, this page offers more flexibility and functions. Existing requests entered by any other method appear on this page.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears. The following information is either captured as part of the PowerScheduler commit process or can be manually defined:

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

Field	Description
New	Click to create a new course request.
Number	The number of the requested course appears.
Course Name	The name of the requested course appears.
Alt	Select the checkbox to indicate that this is an alternate course request.
Code	Enter any single letter to relate alternate requests to a primary request. Alternate requests that are assigned this code are used to substitute for any primary requests that are assigned the same code.
Alt Priority	If you selected the Alternate checkbox, enter a priority number so the system will know which alternate to load first when a student does not receive the elective.
Section Type	Choose the course's section type, if applicable, from the pop-up menu. For example, a student may request a bilingual section of a course.
Alternate 1	Click **Associate** to select the name of the first alternate for this course.

Delete	To delete: • An existing course request, click **YES** under the Delete column next to the appropriate course request. • All existing course requests, click **ALL** at the bottom of the Delete column.

How to Create a New Course Request

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

4. Click **New** to create a new course request. The Edit Course Request [student name] page appears.
5. Click **Associate** to select the name of the course. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections.
6. Click **Submit**. The Modify Schedule - Requests page appears.
7. Enter information as needed.
8. Click **Submit**.

How to Edit a Course Request

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

4. Edit the information as needed.
5. Click **Submit**.

How to Delete a Course Request

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.

   Note: To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.

4. To delete:
   - An existing course request, click **YES** under the Delete column next to the appropriate course request.
   - All existing course requests, click **ALL** at the bottom of the Delete column.
5. Click **Submit**.

How to Reference the Course Catalog

Using the Course Catalog pop-up, you can reference the course catalog for the selected scheduling year.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **Requests**. The Modify Schedule - Requests page appears.
4. Click **Course Catalog**. The Course Catalog pop-up appears.
5. Enter search criteria in the **Search** field.
6. To filter by columns:
   a. Click **+**.
   b. From the first pop-up menu, choose one of the following:
      - **Course Name**
      - **Course Number**
      - **Description**
   c. Enter search criteria in the search field.

      Note: Use a comma-separated list for multiple values.

   d. Click **Apply**. The page refreshes and display filtered results.
7. To add another filter, click **+** and repeat steps a through d.

Note: The **+** appears shaded if all filters have been added.

8. To delete a filter, click **-** next the filter.
9. Click **Apply**. The page refreshes and display filtered results.

   Note: To remove all filter selections, click **Clear**.

10. Use the following table to view search results:

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	Description
Course Name	The course name appears.
Course Number	The course number appears.
Description	The course description appears.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

11. Click **Close** when done.

Add Section Enrollments

Manual scheduling is section-specific and allows you to add one or more specific sections in which to enroll the student, overriding the system-defined schedule if one exists.

Use the Search Available Courses or Quick Enroll functions on the Modify Schedule - Enrollments page to enroll students in a course section.

How to Add a Section Enrollment to a Student Schedule Using Quick Enroll

If you know the course number and the specific section of the course you want to enroll the student, you can use the Quick Enroll function to enroll the student immediately into the section.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Enter the course and section number in the **Course.Section** field.
4. Click **Enroll**. The Modify Schedule - Enrollments page refreshes and displays the new enrollment.

How to Add a Section to a Student Schedule Using Search Available Courses

To search for available courses per period, use the Search Available Course function. You can enter the number of the course in the Course Number field or leave it blank to search all courses. Then, choose the period from the Period pop-up menu to search for sections that are available at that time. Choose **All** to search for all available sections in all periods.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.

   Note: To narrow list of results, use the Filter By function. For detailed information, see *How to Filter Manual Schedule Options*.

3. Do one of the following:
   - Choose the period in which you want to enroll the student from the **Period** pop-up menu.
   - Choose **All** to search for all available sections in all periods.
4. Click **Find**. The Available Courses page appears displaying a list of courses taught during that period.

   Note: For information about the filter options, see *How to Filter Manual Schedule Options*.

   The page displays the following information:

Field	Description

Crs.Sec	The course and section number used to identify the course.
Course Name	The name of the course.
Note	Prerequisites pertaining to the course, if any. For more information, see *Course Prerequisites*.
Expression	The period and day combination of the course.
Term	The term in which the course is being taught.
Teacher	The name of the teacher teaching the course.
Grade	The grade level for which the course is being taught.
Credit Type	The credit type, such as **Math**.
Cr Hours	The number of credit hours earned by taking this course.
Enrollment	The number of students currently enrolled in this course during the selected period, followed by the maximum enrollment figure.

5. Enter the first day the student's enrollment is effective in the **Enroll date** field using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
6. Click a course name to add that course to the student's schedule during the selected period. The Modify Schedule - Enrollments page appears.

   If your system is configured to notify you that the section enrollment is at or above capacity, the Section is Full page appears if the section is at or above capacity. You must enter a password to override the capacity.

How to Filter Manual Schedule Options

Filter the courses that appear on the Available Courses page when manually scheduling students. Filtering focuses your search for an available class according to a number of criteria, such as teacher, credits, and current class size.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Do one of the following:
   - Choose the period in which you want to enroll the student from the **Period** pop-up menu.
   - Choose **All** to search for all available sections in all periods.
4. Click **Find**. The Available Courses page appears displaying a list of courses taught during that period.
5. Select one of the following to filter information on the Available Courses page.

Field	Description
Period	Choose the period from the pop-up menu.
Term	Choose the term from the pop-up menu.
Teacher	Choose the teacher from the pop-up menu.
Day	Choose the day from the pop-up menu.
Grade	Choose the grade level from the pop-up menu.
Credit Type	Choose the credit type from the pop-up menu, such as **Math**.
Course	To jump to a particular course, enter the course number and press RETURN (Mac) or ENTER (Windows).
Show only classes with available seats	Select the checkbox to display only classes that have not reached the maximum enrollment.

6. Repeat Step 4 to further filter the selections.

Drop Section Enrollments

Manual scheduling is section-specific and allows you to drop one or more section enrollments from a student's schedule, overriding the system-defined schedule if one exists. Because dropping a section enrollment from a student's schedule has serious ramifications, use caution when performing this procedure.

How to Drop a Section Enrollment From a Student Schedule

Drop section enrollments individually and immediately by selecting the appropriate Drop checkbox next to the section enrollment you want to delete. To efficiently drop more than one section enrollment from a student's schedule, see *How to Drop Section Enrollments From a Student Schedule*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Select the checkbox next to the section enrollment you want to delete.
4. Click **Drop**. The Drop Classes page appears.
5. Verify the information you want to delete.
6. Use the following table to enter information in the fields:

Field	Description
Student	The selected student appears.
Period	The selected period appears.
Term	The selected term appears.
Crs-Sec	The selected course and section abbreviations appear.
Course	The selected course title appears.
Exit Date	Enter the exit date, which is the first day the student's enrollment is not active or the day after the student's last day in class. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format,

	an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

7. Click **Drop Classes** to drop the section enrollment. PowerSchool drops the student from the selected section, and the schedule appears without the deleted section enrollment.

   Note: If any attendance has been recorded for the enrollment past the dates entered in the Exit Date field, an error message appears. Because you cannot drop enrollments with attendance records past the exit date for the enrollment, you must correct the attendance records before dropping the enrollment.

How to Drop All Sections From a Student Schedule

Use this procedure to drop all section enrollments from a student's schedule.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Modify Schedule** from the student pages menu. The Modify Schedule - Enrollments page appears.
3. Click **All** in the Drop column. The Drop Classes page appears.
4. Enter in the Exit Date field the first day the student is not in class using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
5. Click **Drop Classes** to drop the section enrollment. PowerSchool drops the student from all sections, and the schedule appears without the deleted section enrollments.

   Note: If any attendance has been recorded for the enrollment past the dates entered in the Exit Date field, an error message appears. Because you cannot drop enrollments with attendance records past the exit date for the enrollment, you must correct the attendance records before dropping the enrollment.

Work with Student Schedules

In PowerSchool, work with individual student schedules using the student pages menu or with a group of students using the Group Functions page. Add sections, drop sections, delete enrollment records, transfer students, or enroll an entire group of students. Use the scheduling engine to create student course request forms, a master schedule, and student schedules that are based on both of these elements. For more information, see *Master Schedule Overview*.

You can find the student schedule views on the student pages menu for any student. Each displays the student schedule from a different perspective. Some are view-only, while others can be modified.

- Bell Schedule View
- List View
- Manage Recommendations
- Matrix View
- Modify Current Requests
- Modify Future Requests
- Modify Schedule
- Modify Schedule - Requests
- Override Prerequisites
- Scheduling Setup
- View Current Requests
- View Future Requests

Modify Course Requests

At some schools, administrative staff or guidance counselors enter student course requests directly in PowerSchool for their students. Perhaps all of the ninth graders at your school have made their requests on paper. All initial student course requests and those entering student course requests on behalf of students should enter the student course requests in PowerSchool, not in the scheduling area. Use the scheduling area to change or delete student course requests after the initial requests are made in PowerSchool.

Note: If you use need to edit a request after it has been submitted, do so in the scheduling area. For more information, see *Student Course Requests*.

Because course requests can be made for the current year or for other scheduling years, you must set the schedule year for student requests made in PowerScheduler, in the PowerSchool Student and Parent portal, or on the Requests [Scheduling Year] page in PowerSchool. For more information, see *How to Set the Schedule Year*.

How to Modify Current Course Requests

This function lets students select the courses for the upcoming term within the current school year for which they want to register.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Modify Current Requests**. The Requests [Scheduling Year] page appears.
4. Use the following table to view search results:

Field	Description
Course Catalog	To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.
[Course Group]	Course requests are grouped by course group. If a course requests is not associated to a course group, it appears under Additional Requests. **Note:** If a course group appears read-only, it must be edited in PowerScheduler.
[Course]	Requested courses. If the following appear, click view more information: • A red **Exclamation** icon indicates an alert. • A **Note** icon appears if the course contains prerequisite notes. • A **Road** icon indicates a teacher has recommended the course.
[Edit]	Click the **Pencil** icon next to request a course or modify and existing request. If the following appear, click view more information: • A green **Checkmark** icon indicates if the request listed satisfies the requirements of the course group. • A red **Exclamation icon** indicates an alert.

Requires at least credit hours	Indicates the minimum number of credit hours in all course groups excluding Additional Requests.
Requesting credit hours	Indicates the sum of credit hours in all course groups excluding Additional Requests.
Requesting additional credit hours	Indicates the sum of credit hours of requested courses under Additional Requests.

5. Click **Submit**. The Changes Recorded page appears. View the results of these choices on the Requests View page. For more information, see *View Course Requests*.

How to Modify Future Course Requests

Students can select the courses for the next scheduling year for which they want to register.

Note: The scheduling year is defined in PowerScheduler. For more information, see *How to Set the Schedule Year*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Modify Future Requests**. The Requests [Scheduling Year] page appears.
4. Use the following table to view search results:

Field	**Description**
Course Catalog	To reference the course catalog for the selected scheduling year, click **Course Catalog**. For more information, see *How to Reference the Course Catalog*.
[Course Group]	Course requests are grouped by course group. If a course requests is not associated to a course group, it appears under Additional Requests. **Note:** If a course group appears read-only, it must be edited in PowerScheduler.

[Course]	Requested courses. If the following appear, click view more information: • A red **Exclamation** icon indicates an alert. • A **Note** icon appears if the course contains prerequisite notes. • A **Road** icon indicates a teacher has recommended the course.
[Edit]	Click the **Pencil** icon next to request a course or modify and existing request. If the following appear, click view more information: • A green **Checkmark** icon indicates if the request listed satisfies the requirements of the course group. • A red **Exclamation icon** indicates an alert.
Requires at least credit hours	Indicates the minimum number of credit hours in all course groups excluding Additional Requests.
Requesting credit hours	Indicates the sum of credit hours in all course groups excluding Additional Requests.
Requesting additional credit hours	Indicates the sum of credit hours of requested courses under Additional Requests.

5. Click **Submit**. The Changes Recorded page appears. View the results of these choices on the Requests View page. For more information, see *View Course Requests*.

How to Reference the Course Catalog

Using the Course Catalog pop-up, you can reference the course catalog for the selected scheduling year.

1. On the start page, search for and select a student. For more information, see *Student Search*.

2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Do one of the following:
   - Click **Modify Current Requests**. The Requests [Scheduling Year] page appears.
   - Click **Modify Future Requests**. The Requests [Scheduling Year] page appears.
4. Click **Course Catalog**. The Course Catalog pop-up appears.
5. Enter search criteria in the **Search** field.
6. To filter by columns:

5.
   a. Click **+**.
   b. From the first pop-up menu, choose one of the following:
      - **Course Name**
      - **Course Number**
      - **Description**
   c. Enter search criteria in the search field.

      Note: Use a comma-separated list for multiple values.

   d. Click **Apply**. The page refreshes and display filtered results.

6. To add another filter, click **+** and repeat steps a through d.

   Note: The **+** appears shaded if all filters have been added.

7. To delete a filter, click **-** next the filter.
8. Click **Apply**. The page refreshes and display filtered results.

   Note: To remove all filter selections, click **Clear**.

9. Use the following table to view search results:

Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, students are sorted by Name and then Grade Level.

Field	Description
Course Name	The course name appears.

Course Number	The course number appears.
Description	The course description appears.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

11. Click **Close** when done.

View Course Requests

This page displays the courses a student has requested for the upcoming term within the current school year. Some of these requests may have been fulfilled while others may not have.

Note: This page is view-only for all users.

How to View Current Course Requests

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **View Current Requests**. The View Requests for [Scheduling Year] page appears.
4. Use the following table to review this page:

Field	Description
Crs Num	The number used to identify the course.
Course	The name of the course.
Type	Indicates whether course is required or elective.

Cr Hrs	The number of credit hours earned by taking this course.
Requirements	Indicates any course requirements.
Total Credit Hours Requested	The total number of credit hours earned by taking all requested courses.

How to View Future Course Requests

This page displays what courses a student has requested for the next scheduling year, which is defined in PowerScheduler.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **View Future Requests**. The View Requests for [Scheduling Year] page appears.
4. Review the page as needed. For field descriptions, see *How to View Current Course Requests*.

Prerequisite Overrides

In instances where course prerequisites were not fulfilled prior to a student requesting a course, you can use the Manage Prerequisite Overrides page to override the prerequisite requirements and allow the student to request the course.

Note: To manage prerequisite overrides for multiple students, see *Invalid Requests*.

How to View Prerequisite Overrides

Use the following procedure to view prerequisite overrides for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page displays the following information for each existing prerequisite override:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Course Number	The number of the course for which a prerequisite is being overridden.
Course Name	The name of the course for which a prerequisite is being overridden.
Overridden By	The PowerSchool user who entered the prerequisite override. **Note:** This information does not change if edited by another PowerSchool user.
Comments	Any comments related to the override. **Note:** This information only appears within the PowerSchool Manage Prerequisite Overrides pages.

How to Override a Prerequisite

Use the following procedure to override a course prerequisite for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page appears.
4. Click **Create New Override**. The Add / Edit Prerequisite Override page appears.
5. Use the table to enter information in the following fields:

Field	Description
Course Number	Enter the number of the course for which you want to override a prerequisite. **Note:** This field is required.
Scheduling Year	Choose the school year in which the course you want to override is scheduled from the pop-up menu.
Comments	Enter any comments related to the override. **Note:** This information only appears within the PowerSchool Manage Prerequisite Overrides pages.

6. Click **Submit**. The Manage Prerequisite Overrides page appears.

How to Edit a Prerequisite Override

Use the following procedure to edit an existing prerequisite override for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page appears.
4. Click the **Pencil** icon for the override you want to edit. The Add / Edit Prerequisite Override page appears.

5. Enter information as needed. For detailed information, see *Override Prerequisites*.
6. Click **Submit**. The Manage Prerequisite Overrides page appears.

How to Delete a Prerequisite Override

Use the following procedure to delete an existing prerequisite override for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Manage Requests page appears.
3. Click **Override Prerequisites**. The Manage Prerequisite Overrides page appears.
4. Click the **Pencil** icon for the override you want to delete. The Add / Edit Prerequisite Override page appears.
5. Click **Delete**. The Manage Prerequisite Overrides page appears.

Recommendations

Using the Manage Recommendations page, you can manage student course recommendations. Course recommendations may be required as a prerequisite or they may be purely advisory, where a teacher wishes to advise a student on the path they feel best suits their talents and potential. One a recommendation is made, it appears on the student's Class Registration page in PowerSchool Parent.

How to View Recommendations

Use the following procedure to view course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page displays the following information for each existing recommendation:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Year	The school year in which the course being recommended is scheduled.
Course Number	The number of the course for which a recommendation is being made.
Course Name	The name of the course for which a recommendation is being made.
Recommended By	The PowerSchool user who entered the recommendation. **Note:** This information does not change if edited by another PowerSchool user.
Comments	Any comments related to the recommendation.

	Note: This information only appears within the PowerSchool Manage Recommendations pages.

How to Add a Recommendation

Use the following procedure to create new course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page appears.
4. Click **Create New Recommendations**. The Add/Edit Recommendations page appears.
5. Use the table to enter information in the following fields:

Field	Description
Course Number	Enter the number of the course for which you want to recommend. **Note:** This field is required.
Scheduling Year	Choose the school year in which the course you want to recommend is scheduled from the pop-up menu.
Comments	Enter any comments related to the recommendation. **Note:** This information only appears within the PowerSchool Manage Recommendations pages.

6. Click **Submit**. The Manage Recommendations page appears.

How to Edit a Recommendation

Use the following procedure to edit existing course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page appears.
4. Click the **Pencil** icon for the recommendation you want to edit. The Add / Edit Recommendation page appears.
5. Enter information as needed. For detailed information, see *Add Recommendations*.
6. Click **Submit**. The Manage Recommendations page appears.

How to Delete a Recommendation

Use the following procedure to delete existing course recommendations for a selected student.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Request Management** from the student pages menu. The Request Management page appears.
3. Click **Manage Recommendations**. The Manage Recommendations page appears.
4. Click the **Pencil** icon for the recommendation you want to delete. The Add / Edit Recommendation page appears.
5. Click **Delete**. The Manage Recommendations page appears.

Scheduling Setup

Set student scheduling preferences before creating student course request pages or entering student course requests. By setting these parameters before students submit requests, requests will be created with the appropriate future school and schedule year identifiers. Set student scheduling preferences for an individual student or for a group of students in PowerSchool.

You can also set student scheduling preferences in PowerScheduler; for more information, see *How to Auto Fill Student Information*.

How to Set Scheduling Preferences for an Individual Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Scheduling Setup** from the student pages menu. The Edit Scheduling Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Next Year Grade	Enter the grade level that the student will be entering next school year. If the student is to be retained, enter the student's current grade level.
Priority	Enter a number for the Load Priority for this student. Typically, students in upper grade levels will be assigned a higher priority, such as **10**, to assure that they are scheduled first for courses that they require for graduation. Values range from 1 to 99 and are usually separated by increments of 10, such as 10, 20, 30, and so on.
Schedule This Student	Select the checkbox so that PowerScheduler will schedule the student.
Year of Graduation	Enter the year that the student is expected to graduate from the currently selected school.
Summer School Indicator	If a student plans on attending summer school, choose the appropriate summer school from the pop-up menu. **Note:** If a group of students plan on attending summer school, use the **Summer School Indicator** group function to identify which school the students will attend. For more information, see *Set Summer School Indicator for a Group of Students*.
Note for Summer School Admin	If the student is to attend summer school, you can enter a note for the summer school administrator, such as **Needs to retake Biology**. This note is viewed only on the Student Scheduling Setup page. **Note:** Because the End-of-Year process clears this field, summer school notes will not carry over from year to year.
Next School Indicator	Select the school that the student will enter next year. This ensures that the requests pages used by administrators, students, and parents display the correct course information and that the students are scheduled at the correct school.

	Note: If setting this preference for inactive students, those students appear in PowerScheduler along with the active students. Set this field to "blank" for transferred students.
Next Year Campus/Building (optional)	To select the campus or building that the student will go to next year, click **Associate**. Select a campus or building and click **Submit**.
Next Year House (optional)	To select the house that the student will belong to next year, click **Associate**. Select a house and click **Submit**.
Next Year Team (optional)	Choose the team that the student will belong to next year from the pop-up menu.

4. Click **Submit**. The Changes Recorded page appears.

How to Set Scheduling Preferences for a Group of Students

Enter information in the required fields to set scheduling preferences for a group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Next School Indicator**. The Next School Indicator page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the name of the school the selected students will attend during the next school year from the pop-up menu.
5. Click **Submit**. The Changes Recorded page appears.
6. Click the PowerSchool logo to return to the start page. The current student selection appears.
7. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

8. Under Functions, choose **Student Field Value**. The Student Field Value page appears.
9. Enter **Sched_NextYearGrade** in the **Field to Change** field.
10. Enter the appropriate next year grade level in the **New Field Value** field.
11. Deselect the **Clear Field Value** and **Do not overwrite existing data** checkboxes.
12. Click **Submit**. The Field Value page appears.
13. Click **Submit**. The Alert: Completed page appears.
14. Click the PowerSchool logo to return to the start page. The current student selection appears.
15. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
16. Under Functions, choose **Student Field Value**. The Student Field Value page appears.
17. Enter **Sched_Scheduled** in the **Field to Change** field.
18. Enter **True** in the **New Field Value** field.
19. Deselect the **Clear Field Value** and **Do not overwrite existing data** checkboxes.
20. Click **Submit**. The Field Value page appears.
21. Click **Submit**. The Alert: Completed page appears.

Class Roster

The class roster is the central point from which you can view and manage the students enrolled in a specific class. Using the class roster, you can:

- View the class roster
- Mass drop students
- Mass drop and reschedule students
- Mass enroll students into this class
- Mass enroll students into a different class

Note: Dropping and enrolling may be performed for multiple students, as well as for a single student.

Navigate to and View the Class Roster Page

The Class Roster page is accessible from a number of areas within PowerSchool.

How to View the Class Roster From the Master Schedule Page

Note: The Master Schedule page must be set to View By Matrix in order to access the Class Roster page. For more information, see *How to Set Master Schedule Preferences*.

1. On the start page, choose **Master Schedule** under Functions in the main menu. The Master Schedule page appears.
2. Click the [Enrollment] link to display the section's class roster. The Class Roster page appears.

   Note: The [Enrollment] link appears to the right of the [Course.Section] link.

3. Note the [Teacher] and Course.Section displays.

How to View the Class Roster From the Sections Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Sections**. The Sections page appears.
3. Choose the course name from the courses menu. The course information page appears.
4. Click **Enrollment** to display the section's class roster. The Class Roster page appears.
5. Note the [Teacher] and Course.Section displays.

How to View the Class Roster From the Staff Page

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Current Schedule** from the staff pages menu. The selected teacher's schedule appears.
3. Click **Enrollment** to display the section's class roster. The Class Roster page appears.
4. Note the [Teacher] and Course.Section displays.

How to View the Class Roster From the Teacher Schedules Page

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. Click **Enrollment** to display the section's class roster. The Class Roster page appears.
4. Note the [Teacher] and Course.Section displays.

How to View the Class Roster

On the Class Roster page, you can do the following:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>[Student]</td><td>By default, the Class Roster page displays only the names of the students in the class. Click a student's name to view student pages for that selected student.</td></tr>
<tr><td>Detailed View On</td><td>To view additional information for each student, click the Detailed View switch to On. The page refreshes and displays each student's:
Name
Gender
Grade Level
The date the student Entered the class
The date the student Exited the class
The enrollment Status for each student - Click to edit the student's enrollment record. For more information, see How to Edit an Enrollment Record.</td></tr>
<tr><td>Filter Results By</td><td>The filter function appears when the Detailed View switch is set to On.

Use the filter function to narrow the list of students by one or more of the following:
Active - Select the checkbox to view active students. By default, this checkbox is selected.
Dropped - Select the checkbox to view dropped students.
Pre-Registered - Select the checkbox to view pre-registered students.
Gender - Choose the gender from the pop-up menu to view All, Female, or Male students.
Grade Level - Choose the grade level from the pop-up menu.
Click the arrow to collapse this section. Click the arrow again to expand this section.</td></tr>
</table>

Detailed View Off	Click the **Detailed View** switch to **Off** to only view students' names. **Note:** When viewing the Class Roster in "simple" mode, only students who are active appear. If a student's enrollment dates were modified, the student may no longer appear.

How to Edit an Enrollment Record

Use this procedure to view and edit students' enrollment record for this class.

1. On the Class Roster page, click the **Status** link next to the enrollment record that you want to edit. The Edit Enrollment Record pop-up appears.

   Note: The Edit Enrollment Record pop-up appears based on your security settings. For more information, see *Staff Security Settings*.

2. Use the following table to enter information in the fields:

   Note: For more information, see *All Enrollments*.

Field	Description
Student	The name of the selected student appears.
Course	The name of the selected course appears.
Teacher	The name of the selected teacher appears.
Expression	The name of the selected schedule expression appears.
Enroll Date	Enter the first day the student's enrollment is effective. An entry is only valid if: • The date entered is on or after the first day of the term, and; • Is less than the last day of the term.

	When entering date, us the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the first day the student's enrollment is no longer effective. An entry is only valid if: • The student has already been dropped from the class, and; • The date entered is after the first day of the term and not past the last day of the term. **Note:** If the student has not already been dropped from the class, you can use the **Drop Students** or **Drop Students and Reschedule** functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page. When entering date, use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
[Message]	A message appears indicating that the Edit Enrollment Record pop-up cannot be used to drop a student from the class. To drop a student from the class, use the **Drop Students** or **Drop Students and Reschedule** functions on the Class Roster page or you can use the **Drop** function on the Modify Schedule - Enrollments page.
[State-specific]	Enter state-specific information, as needed.

3. Click **Submit**. The Edit Enrollment Records pop-up closes and the Class Roster page refreshes.

   Note: The Class Roster page does not refresh if only the state-specific fields were edited. The Edit Enrollment Records pop-up closes and a confirmation message appears indicating your changes were saved.

Note: When viewing the Class Roster in "simple" mode, only students who are active appear. If a student's enrollment dates were modified, the student may no longer appear.

Work with Checked Students

How to Make Current Student Selection

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. Click **Make Current Student Selection** to make the selected students your current student selection. The Group Function page appears. For more information, see *Work with Groups*.

How to Add to Current Student Selection

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. Click **Add to Current Student Selection** to add the selected students to your already existing current student selection. The Group Function page appears. For more information, see *Work with Groups*.

How to Mass Enroll Checked Students into a Different Class

Using the Enroll into Different Class function, you can quickly and easily enroll students from this class into a different class.

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.

2. Click **Enroll into Different Class** to enroll the selected students into a different class. The Mass Enroll page appears.
3. To continue, see *How to Mass Enroll in a Class*.

How to Mass Drop Checked Students from this Class

Using the Drop from this Class function, you can quickly and easily drop students from this class. When dropping students from this class, you have the option to enroll them into a different class.

1. On the Class Roster page, do one of the following:
   - Select the **Select All** checkbox to select all students on the class roster. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students on the class roster.
   - Select the checkbox for each student you want to work with. Click a student's name to view student pages for that student.
2. In the Use checked students to section, click **Drop from this Class** to drop the selected students from this class. The Drop Students Preview page appears.

   Note: If you click **Back** to return to the Class Roster page, the students you selected remain checked, but do not become the current student selection. Only when the **Drop Students** or **Drop Students and Reschedule** button is clicked do the checked students become the current student selection.

3. Use the following table to verify information and make any necessary corrections prior to dropping students:

Field	Description
Exit Date	Defaults to today's date. Click **Edit Date** to select a different exit date, if needed.
Clear attendance on and after Exit Date	If dropping a student who has attendance records on or after the exit date, select the checkbox to clear the attendance records. Clearing attendance records avoids attendance records being orphaned. **Note:** If all students listed have attendance records on or after the exit date, the **Drop Students** and **Drop Students and Reschedule** buttons appear shaded.

	Note: To perform attendance auditing, you can access the DBlog table using DDA to view attendance records that have been cleared using this function. For more information DDA, see *Direct Database Access (DDA)* and for information about the DBlog table, see the *PowerSchool Data Dictionary Tables* available on PowerSource.
Number	The student's identification number.
Name	The student's name.
Action	Confirmation or warning: • Delete enrollment - The student's drop date is on or before the enrollment date and has no attendance associated with the section. • Delete enrollment, delete attendance records (count of each record type) - The student's drop date is on or before the enrollment date and has attendance associated with the section. • Drop on [date] - The student's enrollment can be dropped successfully. • Drop on [date], delete attendance records (count of each record type) - The student's enrollment can be dropped successfully. • None (not enrolled on [date]) - The student is not enrolled in the section. • None (student has attendance on or after [date]) - The student cannot be dropped because attendance records would be orphaned. **Note:** [Date] indicates the exit date if the exit date is within range of the term start/end dates. If it occurs after the term end date, then it is adjusted to equal the term end date. If it occurs before the term date begins, it is adjusted to equal the term begin date. **Note:** If all students listed cannot be dropped based on the action listed, the **Drop Students** and **Drop Students and Reschedule** buttons appear shaded.

4. Do one of the following:

   Note: All students in the current selection are evaluated to be dropped from the section. However, only students applicable to the section will be dropped.

   - To drop students from this class, click **Drop Students.** The Class Roster page displays a confirmation message. The dropped student(s) no longer appear.

     Note: If the exit date is in the future, the students remain on the Class Roster page until the scheduled exit date.

   - To drop students from this class and enroll them into a different class, click **Drop Students and Reschedule**. The students will be removed from the class effective the scheduled exit date and the Mass Enroll page appears. To continue, see *How to Mass Enroll in a Class*.

Work with Currently Selected Students

To work with currently selected students, you must first make your student selection prior to navigating to the Class Roster page.

Note: If you have not made a student selection prior to navigating to the Class Roster page, this section does not appear. For more information about making a student selection, see *Student Search*.

Note: To view student pages for the student selection, click the number in the Use currently selected [#] students to section header.

How to Mass Enroll Student Selection into this Class

Using the Enroll into this Class function, you can quickly and easily enroll students into this class.

1. On the Class Roster page, click **Enroll into this Class** to enroll the student selection into the section. The Mass Enroll Preview page appears.
2. To continue, see *How to Mass Enroll in a Class*.

How to Mass Drop Student Selection from this Class

Using the Drop from this Class function, you can quickly and easily drop students from this class. When dropping students from this class, you have the option to enroll them into a different class.

1. On the Class Roster page, in Use currently selected [#] students to, click **Drop from this Class** to drop the student selection from this class. The Drop Students Preview page appears.

   Note: All students in the current selection are evaluated to be dropped from the section. However, only students applicable to the section will be dropped.

2. Verify information and make any necessary corrections prior to dropping students. For field descriptions, see *How to Mass Drop Checked Students from this Class*.
3. Do one of the following:
   - To drop students from this class, click **Drop Students.** The Class Roster page displays a confirmation message. The dropped student(s) no longer appear.
   - To drop students from this class and enroll them into a different class, click **Drop Students and Reschedule**. The Mass Enroll page appears. To continue, see *How to Mass Enroll in a Class*.

Work with Groups

Work with Groups

Once you select a group of students, you can manage the group's records in a variety of ways. Groups functions are accessible either by selecting a group of students on the start page, clicking the **[Select Function]** arrow and choosing a function from the Group Functions pop-up menu or if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**. For more information, see *Select a Group of Students* or *Current Selection*.

Group Attendance

Change the attendance records either for one date range, day, or period for a selected group of students. In addition, you can change the attendance records either retroactively or in advance using either Meeting or Daily attendance. Meeting attendance is taken each time a class meets, whereas Daily attendance is taken for an entire school day. For more information about attendance, see *Attendance Overview*.

How to Change Group Attendance (Meeting)

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Attendance, choose **Attendance Change**. The Change Meeting Attendance page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Change attendance for	The selected students appear.
From this date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Meetings to scan	Select the checkboxes to indicate the periods to change. To mark attendance for the entire day, click **Select All**.
Codes to scan for	Either choose all by selecting **All** or select **These Codes** and then choose the attendance codes for which you want to scan.
Attendance code to set	Choose the attendance code to apply to the date range from the pop-up menu.
If other than a default present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record.

5. Click **Submit**. The PowerSchool start page appears. To verify that you entered the correct codes, search for and select one of the students in the group. Then, view the student's Attendance page.

How to Change Group Attendance (Daily)

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Attendance, choose **Attendance Change**. The Change Meeting Attendance page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Daily**. The Change Daily Attendance page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Change attendance for	The selected students appear.
From this date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
To this date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Codes to scan for	Either choose all by selecting **All** or select **These Codes** and then choose the attendance codes for which you want to scan

Attendance code to set	Choose the attendance code to apply to the date range from the pop-up menu.
If other than a default present	Select the option to either overwrite or not overwrite any existing attendance codes.
Comment	Enter comments that are relevant to this attendance record.

6. Click **Submit**. The PowerSchool start page appears. To verify that you entered the correct codes, search for and select one of the students in the group. Then, view the student's Attendance page.

Automatic Email Setup

Using the Automatic Email Setup page, you can indicate the type of information and the frequency at which the information is distributed to parents/guardians via email.

How to Set Up Automatic Email

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Choose **Student Screens**. The Student Screens Menu page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose **Auto Email Reports** from the pop-up menu:
5. Use the following table to enter information in the fields:

Field	Description
Parent is registered to receive	Select the checkbox of the information the student's parent is to receive: • **Summary of current grades and attendance**

	• **Detailed report showing all assignment scores for each class** • **School announcements**
How often?	Choose the frequency of which emails are to be sent to parent: • **Never** • **Once a Week** • **Once every two weeks** • **Once a month** • **Daily**
Send now?	Select the checkbox to send an email immediately.
Parent's email address	Enter the parent's email address. **Note:** Use a comma to separate multiple emails. Do not include blank spaces between the comma and the email.

6. Click **Submit**. If the **Send now?** checkbox was not selected, the Changes Recorded page appears. If the **Send now?** checkbox was selected, the Sending Mail page appears.

Perform Batch Address Validation

The batch address validation process provides you with the ability to validate and update address information for multiple students all at one time.

The batch address validation process may be used to validate either the primary address or the mailing address of the selected students. When validating primary addresses, a geocode is generated and associated to the student’s primary address. When validating mailing addresses, a geocode is generated and associated to the student’s mailing address.

When performing the batch address validation process, a street, city, state, and zip code may be automatically updated if there is only one matching address that is of address level accuracy. If there is not an address meeting these criteria, a validation exception occurs and the address appears as an exception, providing you the opportunity to reconcile the discrepancy.

Note: This process may take several minutes to complete (or longer) depending on the selection size and your connection speed to the Internet.

How to Perform Batch Address Validation

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Validation, choose **Batch Address Validation**. The Batch Address Validation page appears.
4. Use the following table to enter information in the fields:

Field	Description
Validate which students	Indicate which students you want to validate addresses for by choosing one of the following from the pop-up menu: • Choose **All Students** to perform the validation process for all students in the current school. • Choose **Current Selection** to perform the validation process for the selected set of students in the current school. **Note:** For performance reasons, it is recommended that you perform the validation process for a selected set of students rather than for all students.
Validate which addresses	Indicate which addresses you want to validate by choosing one of the following from the pop-up menu: • Choose **Addresses without geocodes** to perform the validation process for only those addresses that have not been previously validated and do not have a geocode.

	Note: For performance reasons, it is recommended that you perform the validation process for addresses that do not have geocodes rather than for all addresses.
Which address types	Indicate which address type you want to validate by choosing one of the following from the pop-up menu: • Choose **Primary** to perform the process for students' home address. • Choose **Mailing** to perform the process for students' mailing address.
Update Street, City, State, Zip	Select the checkbox to automatically update the street, city, state, and zip code of each address with the street, city, state, and zip code information provided by the validation process, if only one address is returned by the validation service and that address is of address level accuracy. Alternatively, leave the checkbox blank if you do not want to automatically update the street, city, state, and zip code of each address with the street, city, state, and zip code information provided by the validation process. **Note:** This checkbox is applicable only when one address of address level accuracy exists.

5. Click **Submit**. The Batch Address Validation Results page displays a summary of the processed records and any validation exceptions, including the student's name, address, and error message. Possible error messages include:
    - Unknown location. Cannot find address.
    - Country level accuracy. Cannot find state.
    - State/Province level accuracy. Cannot find city.
    - County level accuracy. Cannot find street.
    - City level accuracy. Cannot find street.
    - Postal code level accuracy. Cannot find street.
    - Partial street level accuracy. Cannot find street number.
    - Intersection level accuracy. Cannot find street number.
    - Premise level accuracy. Invalid address.

Note: Premise level accuracy appears when only the name of a building or type of building, such as airport, can be found.

6. If an exception appears, click the **Name** of the student to view the student's General Demographics page where you can then reconcile the discrepancy.

Perform Batch Boundary Validation

The batch boundary validation process provides you with the ability to establish a set of students who fall within or outside of a given boundary. Once a set of students is identified, you can then perform a number of group functions with those students, such as setting the next school indicator or printing reports or form letters for a group of selected students..

Note: Boundary validation is based on a student's home, or primary, address.

How to Perform Batch Boundary Validation

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Validation, choose **Batch Boundary Validation**. The Batch Boundary Validation page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Check boundary membership for which student	Indicate which students you want to validate boundaries for by choosing one of the following from the pop-up menu: • Choose **All Students** to perform the validation process for all students in the current school. • Choose **Current Selection** to perform the validation process for the selected set of students in the current school.

	Note: For performance reasons, it is recommended that you perform the validation process for a selected set of students rather than for all students.
Use which boundary	Choose the district or school from the pop-up menu for which you want to perform the boundary validation process. **Note:** Only districts or schools with defined boundaries appear in the pop-up menu.
Select students who are	Indicate which students you want the validation process to return as an updated selection by choosing one of the following from the pop-up menu: • Choose **Within the selected boundary** to return students who live within the boundary. • Choose **Outside the selected boundary** to include students who live outside of the boundary.

5. Click **Submit**. The Batch Boundary Validation Results page appears. The **View Current Selection** link appears indicating the number of students found within or outside the selected boundary.
6. To work with the group of students, click **View Current Selection**. The Student Selection page appears.

Enrollment Summary

The Enrollment Summary report can be run from the district level, as well as the school level. Depending on which mode you run the report, the resulting report displays a breakdown of students for the entire district or school. If running the report at the district level, the Enrollment Summary page displays student Scheduling/Reporting Ethnicity data. If running the report at the school level, the Enrollment Summary page provides you with student Scheduling/Reporting Ethnicity data, as well as student Federal Ethnicity and Race data.

How to Navigate to the Enrollment Summary from the Start Page

If running the report at the district level, data is calculated for all active students for today's date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

On the start page, choose **Enrollment Summary**. The Enrollment Summary page appears.

How to Navigate to the Enrollment Summary from the Student Selection Page

If running the report at the district level, data is calculated for your student selection for today's date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Enrollment Summary**. The Enrollment Summary page appears.

How to Navigate to the Enrollment Summary from the Group Functions Page

If running the report at the district level, data is calculated for your student selection for today's date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
3. Click **Group Functions**. The Group Functions page appears.
4. Under Enrollment, click **Enrollment Summary**. The Enrollment Summary page appears.

How to Navigate to the Enrollment Summary from the Reports Page

If running the report at the district level, data is calculated for all active students for a selected date. If running the report at the school level, you can choose the students and date (depending on student selection) for which you want data to be calculated.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. On the System tab, click **Enrollment Summary by Date**. The Enrollment Summary by Date page appears.
3. Use the following table to enter information in the fields:

Field	Description
Calculate enrollments as of	Enter the date for which you want to calculate enrollments.
Report Output Locale	Use the pop-up menu to choose which language you want the report output to display.

4. Click **Submit**. The Enrollment Summary page appears.

How to View the Enrollment Summary

1. Navigate to the Enrollment Summary page. The Enrollment Summary page appears.

   Note: If running the report at the district level, skip to the Scheduling/Reporting Ethnicity table.

2. Use the following table to enter information in the fields:

Field	Description
View	Do one of the following: • Choose **Scheduling/Reporting Ethnicity** to view student ethnicity data that is used in scheduling and preconfigured reporting. • Choose **Federal Race and Ethnicity** to view displays aggregate student data as required by the Federal Ethnicity and Race Categories from the U.S. Department of Education.
Students	Indicate which students you want to calculate enrollment by selecting one of the following options: • Select **All Active Enrollments** to run the report for all students in the current school.

	• Select **Current Selection** to run the report for students in the current selection.
Date	Enter the date for which you want to calculate enrollments or click the **Calendar** icon to select a date. **Note:** If you selected **Current Selection** for students, this field appears shaded as it is not applicable.

If you selected Scheduling/Reporting Ethnicity, the following information appears in the Results section:

Note: Column and row headings provide links to charts that display ethnicity information in an easy-to-read animated chart. Click a column or row heading to view enrollment by ethnicity in specific grades, overall ethnicity enrollment by grade, or total enrollment by ethnicity. Click any bar within a chart to view additional information.

Note: Totals include total enrollment of male and female students (light blue), total male students (dark blue), and total female students (pink). Totals appear as links. Click a total to view the list of students associated to that total.

Field	Description
Grade Level	The grade levels for the selected school. **Note:** Only grade levels used by the district/school appear in the report.
Total in Grade	The total number for each grade level.
[Ethnicity and Race Categories]	The total number for each ethnicity or race.

If you selected Federal Ethnicity and Race, the following information appears in the Results section:

Note: Totals include total enrollment of male and female students (light blue), total male students (dark blue), and total female students (pink). Students are only calculated once and appear in the appropriate column based on their Federal Race and Ethnicity settings on the Demographics page. Totals appear as links. Click a total to view the list of students associated to that total.

Field	Description
Grade Level	The grade levels for the selected school. **Note:** Only grade levels used by the district/school appear in the report.
Total in Grade	The total number for each grade level.
[Race Categories]	The total number for each race category appears. **Note:** If **No** was selected for **Ethnicity** or if it was undefined and race codes that apply to only one race category were selected, then the student is calculated in the appropriate race category column.
Hispanic or Latino	The total number for each race category appears. **Note:** If **Yes** was selected for **Ethnicity**, then the student is calculated in this column. This setting takes precedence over all other race settings.
Two or More Race Categories	The total number of students who are associated to two or more race categories appear. **Note:** If **No** was selected for **Ethnicity** or if it was undefined and race codes that apply to two race categories were selected, then the student is calculated in this column.
Unspecified	The total number of students who have not specified a race category or ethnicity appear.

Templates for Exporting

Export information by using a template. Select the template from a list or create a new one. For more information about exporting, see *Quick Export*.

Database Extensions and Export Templates

Users can add table extension fields to export templates created for the selected table using the following methods for the Data to Export field:

- For Student and Users tables, click **Fields** and select from the pop-up.
- For Courses, Historical Grades, and Student Schedules tables, enter the database extension field name manually.

How to Create an Export Template

If there is no template that you can use to perform the export or no template you can edit to meet your needs, you must create a new one.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click **New**. The New Export Template page appears.
7. Use the following table to enter information in the fields:

Field	Description
Name of this template	Enter a name for the template.

Export from this table	Choose the table that will be used in the export from the pop-up menu.
Delimited or fixed-field length?	Choose either **Delimited** or **Fixed** from the pop-up menu to determine the length of each field.
Field delimiter	If you chose **Delimited** in the previous field, use the pop-up menu to choose the field delimiter. This refers to the item that will separate the fields in the exported data. If you choose **Other**, enter the delimiter in the blank field. Select the checkbox to surround field values with quotation marks.
End-of-line (record) delimiter	Choose the delimiter for the end of each record from the pop-up menu. For **Other:**, enter the delimiter in the blank field.
Column Titles	Select the checkbox to put column titles on the first row.
Mime Type	Enter a MIME type. To use the default MIME type, leave the field blank. For more information, see *MIME Types*.

8. Click **Submit**. The Templates for Exporting page displays the new template. Add columns to the template using the procedure *How to Add Template Columns*.

How to Add Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click **New** to add a column to the template. The New Column page appears.
8. Use the following table to enter information in the fields:

Field	**Description**
Title/Heading	Enter a title for the column.
Data to Export	Enter the fields to be included in the export. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** If you are adding database extension fields for Courses, Historical Grades, and Student Schedules tables, enter the extension field name using the format [extension name].[fieldname].
If Blank, Export This	If a record has no data for a particular field, indicate a value to replace the blank field (optional). For example, enter **No Data**.
Column Number	Enter a column number for this column on the template. All column numbers will have a zero added as a suffix to the column number.

Width in Characters	Enter the width of the column in characters if using fixed-field lengths instead of field delimiters.
Alignment	Use the pop-up menu to choose the alignment of the column if using fixed-field lengths instead of field delimiters.

9. Click **Submit**. The Edit Columns page appears.
10. Repeat the previous three steps to add additional columns to the template.
11. Click **Back to Templates for Exporting**. The Templates for Exporting page appears.

The template has been changed. Perform the export by following the instructions in the section *Export Using a Template*.

How to Edit a Template

When you need a list that differs slightly from the list that a template produces, you can easily modify the template to meet your needs.

Note: Everyone who uses the template will view the changes you enter. Contact other users before changing a template that many people use.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.

6. Click the name of the template you want to edit. The Edit Export Template page appears.
7. Edit the information as needed. For field descriptions, see *How to Create an Export Template*.
8. Click **Submit**. The Templates for Exporting page appears. To continue modifying the template, see *How to Edit Template Columns*.

How to Edit Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click the Title of the column you want to edit. The Edit Column page appears.
8. Edit the information as needed. For field descriptions, see *How to Add Template Columns*.
9. Click **Submit**. The Edit Columns page appears.

How to Delete a Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the name of the template you want to delete. The Edit Export Template page appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The Selection Deleted page appears.

How to Delete Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.

7. Click the Title of the column you want to delete. The Edit Column page appears.
8. Click **Delete**.
9. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export Using a Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Use the following table to enter information in the fields:

Field	Description
Type of Export	The type of data to export appears.
Export template?	Choose the template to export from the pop-up menu.
For Which Records?	The number of selected records appears.

6. Click **Submit**. The results of the export appear.
7. Choose **File** > **Save As...**.
8. In the Save dialog, specify a name, location, and file type.
9. Click **Save**. Open the file using a spreadsheet or other application.

Fee Functions

Fee Functions offers similar functionality as Fee Transactions, but these functions are used for a selected group of students. You can access Fee Functions one of two ways: click **Special Functions** on the start page or search for and select a group of students and then choose **Fee Functions** from the Group Functions pop-up menu. From the Fee Functions page, you can create transactions, assess school enrollment and course enrollment fees, and clear current balances. Each time you perform a group fee function, the system generates a group ID. The group ID can then be used to perform additional actions, such as reversing fee assessments or transactions and for generating reports.

Group Transaction IDs Warning

Each time such a group transaction is performed, a new Group Transaction ID is generated and assigned to each record created by the transaction. When running any of the group functions that require entering a Group Transaction ID, be sure to enter the correct Group Transaction ID. If you inadvertently enter the wrong Group Transaction ID, you may be affecting a large amount of date and reversing the error may take considerable time. To find the group transaction ID, check at least one fee or transaction record that has been created by the group fee functions.

How to Add Student Fees for Group of Students

Using the Fee Functions page, you can manually assess a group of students with student fees, such as Recreational Field Trip. Be sure the information you enter is accurate, as there is no edit or delete function for student fees (to preserve the history of the transaction). If you inadvertently make a mistake, you will have to create a transaction using payment, credit, or void to reverse the effect.

Note: To manually assess an individual student with student fees, see *Fee Transactions*.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New Fee**. The New Fee page appears.
5. Use the following table to enter information in the fields:

Field	Description
Add Fee For	The selected number of students appears.
Fee Type	Choose the fee type you want use to create the fee.
Department	Choose the department you want to associate to this fee, if any.
Transaction Date	Enter the date the student fee is to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation of the fee being created.
Amount of Fee	The dollar amount to be assessed to the students' account balance appears.
Amount of Credit	If the students are providing full or partial payment at the time this fee is being created, enter the payment amount in this field. **Note:** If the students' payment is greater than the fee, the extra money will be applied as payment to other unpaid fees based on fee type priority.
Payment Method	If the students are providing full or partial payment at the time this fee is being created, choose the method of payment from the pop-up menu.
Payment Reference Number	If the students are providing full or partial payment at the time this fee is being created, enter the payment reference number in this field.
Course Number	If this fee is related to a course, enter the number used to identify the course in this field.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

How to Add School Enrollment Fees

School enrollment fees are used to automatically assess certain fees when students enroll in school. For more information, see *School Enrollment Fees*. If school enrollment fees are created after students have enrolled in school, then the new school enrollment fees need to be manually assessed.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New School Enrollment Fee**. The New School Enrollment Fee page appears.
5. Use the following table to enter information in the fields:

Field	Description
Add Selected School Enrollment Fees For	The selected number of students appears.
School Enrollment Fees For	The name of the selected students' school appears.
Description (Fee Type)	Select each school enrollment fee checkbox you want to be applied to the selected students.
Amount	The dollar amount to be assessed to the selected students' account balance appears.

Transaction Date	Enter the date the fees are to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

   Note: If a fee is marked as proratable, it will be assessed on the basis of the number of school days in the year.

How to Add Course Enrollment Fees

Course enrollment fees are used to automatically assess certain fees when students enroll in a course that has fees associated to it. For more information, see *Course Enrollment Fees*. If course enrollment fees are created after students have enrolled in a course, then the new course enrollment fees need to be manually assessed.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New Course Enrollment Fee**. The New Course Enrollment Fee page appears.
5. Use the following table to enter information in the fields:

Field	Description
Add Course Enrollment Fees For	The selected number of students appears.

Course Number	Enter the course code for which you want to assess course enrollment fees.

6. Click **Submit**. The second New Course Enrollment page appears.
7. Use the following table to enter information in the fields:

Field	Description
Add Course Enrollment Fees For	The selected number of students appears.
Course Number	The course code for which you want to assess course enrollment fees appears.
Description (Fee Type)	Select each course enrollment fee checkbox you want to be applied to the selected students.
Amount	The dollar amount to be assessed to the selected students' account balance appears.
Transaction Date	Enter the date the fees are to be assessed. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

8. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

   Note: If a fee is marked as proratable, it will be assessed on the basis of the number of days within the term for the course section.

How to Create a New Transaction

Use this procedure to create a new transaction for the selected group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **New Transaction**. The New Transaction page appears.
5. Use the following table to enter information in the fields:

Field	Description
Add Transaction For	The number of selected students for which their transaction is being created.
Fee Type	The fee type from which the fee was created appears, such as Enrollment. **Note:** For more information about fee types, see *Fee Types*.
Transaction Date	Enter the date of the transaction. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Transaction Type	Choose from the pop-up menu the type of transaction you want to create: • **Payment** • **Credit** • **Void**
Description	Enter an explanation for creating the transaction.

Amount	Enter the amount of the payment. If the Transaction Type selected is **Void**, there is no need to enter a value in this field. The amount will be set by the fee balance. **Note:** If you make a mass payment and the payment is higher than the balance for a specific student, that student will receive a credit.
Payment Method	Choose the method from the pop-up menu by which the payment is being made: • **Cash** • **Credit Card/Bank Card** • **Check/Draft** • **EFT (Electronic Funds Transfer)** • **Money Order** • **Vouchers** For more information, see *Payment Methods*.
Payment Reference Number	You can use this field to record additional payment information, such as a check number.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

How to Assess School Enrollment Fees

Use this procedure to assess school enrollment for the selected group of students. Performing this procedure automatically assigns school enrollment fees to the selected group of students. Before running this function, be sure that the fees have not already been assessed to the selected students. Otherwise, the fees may be duplicated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Assess School Enrollment Fees**. The Assess School Enrollment Fees page appears.
5. Select the appropriate option to indicate which students you want to apply the school enrollment fee to:
    - **For all currently enrolled students in [name of school]**
    - **For the selected [number] students only**
    - **For [name of student] only**
6. Click **Submit**. A confirmation message appears.

How to Assess Course Enrollment Fees

Use this procedure to assess course enrollment for the selected group of students. Performing this procedure automatically assigns course enrollment fees to the selected group of students. Before using this function, be sure that the fees have not already been assigned to the selected students. Otherwise, the fees may be duplicated.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

    Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Assess Course Enrollment Fees**. The Assess Course Enrollment Fees page appears.
5. Select the appropriate option to indicate which students you want to apply the course fee to:
    - **For all currently enrolled students in [name of school]**
    - **For the selected [number] students only**
    - **For [name of student] only:**
6. Click **Submit**. A confirmation message appears.

How to Clear Current Balance

Use this procedure to clear current balances for the selected group of students. Performing this procedure removes school or course enrollment fees that have been assigned to a selected group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Clear Current Balance**. The Clear Current Balance page appears.
5. Use the following table to enter information in the fields:

Field	Description
[Student Selection]	Select the appropriate option to indicate which students you want to clear current balances for: • **For all currently enrolled students in [name of school]** • **For the selected [number] students only** • **For [name of student] only**
Transaction Date	Enter the date for which you want the clearance to occur. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for clearing the balance.

6. Click **Submit**. A confirmation message appears.

How to Reverse Action Using Group Transaction ID

Use this procedure to reverse unpaid fees. This is the easiest way to correct an action that you have performed on a group of students. Performing this procedure will not reverse a transaction of type Void. Transactions that have been performed outside of the group function do not have a Group Transaction ID. In those cases, you have to reverse them manually.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Fee Functions**. The Fee Functions page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Reverse Action Using Group Transaction ID**. The Reverse Action Using Group Transaction ID page appears.
5. Use the following table to enter information in the fields:

Field	Description
Group Transaction ID	Enter appropriate Group Transaction ID. **Note:** It is very important that you enter the correct Group Transaction ID.
Transaction Date	Enter the date for which you want the reversal to occur. The default is set to today's date. **Note:** If you enter a different date, be sure to use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter an explanation for reversing an action.

6. Click **Submit**. A confirmation message appears, as the system generates a Group Transaction ID.

Once graduation planner is set up, you can then begin working with groups of students managing graduation plans and generating graduation progress reports and summaries.

Graduation Plans

Using the group Graduation Plan Selection page, you can manage graduation plans for a selection of students.

How to Select a Graduation Plan

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Plan Selection**. The Graduation Plan Selection page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Action to Take	Select the **Add the selected plans** option.
Graduation Contracts	In the list box on the left, click the name or the specific version of the graduation contract you want to select. The selected graduation contract appears in the list box on the right. To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button. If selecting multiple graduation contracts, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page.

	Note: If the name is selected instead of a specific version, the student will be assigned the version of the plan that matches their **Year Entering Graduation Plan** setting on the Graduation Plan Selection student page.
Post-Secondary Preparation Plans	In the list box on the left, click the name or the specific version of the post-secondary preparation plan you want to select. The selected post-secondary preparation plan appears in the list box on the right. To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button. If selecting multiple post-secondary preparation plans, use the up and down arrows to indicate the order in which you want the items to appear in the Graduation Plan Progress page. **Note:** If the name is selected instead of a specific version, the student will be assigned the version of the plan that matches their **Year Entering Post-Secondary Preparation Plans** setting on the Graduation Plan Selection student page.

5. Click **Submit**. The Changes Recorded page appears.

How to Replace a Graduation Plan

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Plan Selection**. The Graduation Plan Selection page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Action to Take	Select the **Replace all student selections with the versions below** option.
Graduation Contracts	In the list box on the left, click the name of the graduation contract you want to select. The selected graduation contract appears in the list box on the right. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.
Post-Secondary Preparation Plans	In the list box on the left, click the name of the post-secondary preparation plan you want to assign to the student. The selected post-secondary preparation plan appears in the list box on the right. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.

5. Click **Submit**. The Changes Recorded page appears.

How to Remove a Graduation Plan

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Plan Selection**. The Graduation Plan Selection page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Action to Take	Select the **Remove the selected plans** option.
Graduation Contracts	To remove a graduation contract from the list box on the right, click the **Minus (-)** button next to the graduation contract you want to remove. To remove all graduation contracts from the list box on the right, click the **Unpick All** button. **Note:** If the name is selected instead of a specific version, the student will be removed from all versions of the plan.
Post-Secondary Preparation Plans	To remove a post-secondary preparation plan from the list box on the right, click the **Minus (-)** button next to the post-secondary preparation plan you want to remove. To remove all post-secondary preparation plans from the list box on the right, click the **Unpick All** button. **Note:** If the name is selected instead of a specific version, the student will be removed from all versions of the plan.

5. Click **Submit**. The Changes Recorded page appears.

Graduation Progress Reports

Use the Graduation Progress Report to creates a printable graduation progress report for the selected students in their selected plans.

Warning: This report may adversely impact the performance of the system if run for too large a selection of students. Plan to run this report at off-peak times, or check with your system administrator prior to running.

Note: Due to browser differences, some browsers may fail to properly print this report. The fully supported browsers for this report are Internet Explorer 6.0+ on Windows, Safari 2.0+ on OS X, and Firefox 3.0+ on all platforms.

How to View the Graduation Progress Report

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Progress Report**. The Graduation Progress Report Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Students	The current selection of students.
Include page for students with no plan	Select the appropriate option: • **Skip students with no plan** • **Include all students**

5. Click **Submit**. The Graduation Progress Report page displays the following information for each student:

Field	Description
[Student Name]	The student's name.
[Student Number]	The student's number.
Graduation Plan	The name of the graduation plan. To view additional information: 1. Click the name of the graduation plan. The [Graduation Plan] drawer opens. 2. Review information.

	3. Click **Close**.
Required Tests	
Test Name	The name of a required test for this graduation plan to track test scores, such as ACT, STAR, etc. Click to view detailed information.
Action	To view a waiver for a required test: 1. Click the **Notebook** icon. The View Waiver drawer opens and displays the following information: • **Test Name** • **Waiver Type** • **Waiver Reason** • **Waiver Source** • **Waiver Date** • **Authorized By** 2. Click **Close**. The View Waiver drawer closes. **Note:** The **Notebook** icon only appears if the **Allow Waiver** checkbox on the Edit Graduation Plan Test Requirements page has been enabled and a waiver has been added for the subject group.
Attempts	The number of times the student has taken the required test.
Completed	Indicates whether the student has passed, failed, waived, or has not taken the required test.
Subject Groups	
Subject Group	The name of the subject group within the graduation plan used to track credit hours for a specific subject area. To view additional information: 1. Click the name of a subject group. The [Subject Group] drawer opens. 2. Review information. 3. Click **Close**.

[Waiver]	To view a waiver for a subject group: 1. Click the **Notebook** icon. The View Waiver drawer opens and displays the following information: • **Graduation Plan** • **Subject Group** • **Path to Node** • **Waiver Type** • **Waiver Reason** • **Waiver Source** • **Elective Subject Group** • **Waiver Date** • **Credit Waived** • **Authorized By** 2. Click **Close**. The View Waiver drawer closes. **Note:** The **Notebook** icon only appears if the **Allow Waiver** checkbox on the Edit Graduation Plan Requirement page has been enabled and a waiver has been added for the subject group.
Earned	The total number (and individual number) of credits for courses within the subject group that the student has earned.
Enrolled	The total number of courses within the subject group that the student is currently enrolled in.
Requested	The total number (and individual number) of credits for courses within the subject group that the student has requested.
Waived Credits	The total number of credits within the subject group that can be waived.
Applied Waiver Credits	The total number of credits within the subject group that have be waived.
Required	The total number of credits within the subject group that are required.

Progress	The total number of credits within the subject group that are in progress. Progress is indicated by the use of a color-coded bar: • Dark green indicates completed credits. • Green indicates current enrollments. • Blue indicates waived credits. • Yellow indicates requested credits.
[Checkmark]	A green checkmark indicates that a requirement has been completely satisfied with earned credits.

6. To print the report:

   Note: Instructional text that appears on the page will not be sent to the printer. When printing, each student's Graduation Progress Report will be printed on a separate page.

   - Turn on printing of "backgrounds" in your printer settings. Shading and colorations in this report are all "backgrounds" and not printing backgrounds will generally lead to illegible printouts.
   - Turn off printing of "header" information in your browser settings. If this is not off, each page printed will include (depending on browser) the URL of this page, a page number, and a time stamp. These are generally not desired for this report.
   - Use your browser's "Print Preview" feature to confirm that the output is correct prior to sending to the printer. You may adjust text size using the text font size controls of your browser. You may also control landscape/portrait printing via your browser settings. Doing so may prevent table cells from spanning page breaks and instances where the report appears too small in the final output.
   - Use your browser's "Print" feature to print the report.

Graduation Progress Report Data Capture

Use the Graduation Progress Report Data Capture function to store graduation plan progress data for future reporting.

Warning: This report may adversely impact the performance of the system if run for a large selection of students. To offset the impact on performance, check with your system administrator prior to running the report or run the report at an off-peak time.

How to Run the Graduation Progress Report Data Capture Function

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Progress Report Data Capture**. The Graduation Progress Report Data Capture Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Click **Submit**. A confirmation message appears.

Graduation Progress Summary

Use Graduation Progress Summary to view a summary of graduation plan progress against specified requirements of a user-selected plan.

How to View the Graduation Progress Summary

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Graduation, choose **Graduation Progress Summary**. The Graduation Progress Summary Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Students	The current selection of students.

Plan Version to Display	Click the name of the graduation plan for which you want to view a summary. The selected graduation plan appears in the Columns to Display the list box on the left.
Columns to Display	Click the graduation plan, subject groups, and/or child subject groups you want to appear in the summary. The selected items appear in the list box on the right. Use the up and down arrows to indicate the order in which you want the items to appear in the summary. **Note:** Use the **Minus (-)** button next to an item to remove the item or the **Unpick All** button to remove all items from the list box.

5. Click **Submit**. The Graduation Progress Summary page displays graduation plan information for student.

Health Screenings

Using the Health Screenings group function, you can view health screening information for a selected group of students for a selected date and screening type. Additionally, you can set default screening values for particular screening types and apply them to the selected group of students, as needed.

Note: The Health Screenings group function is only available if you have unrestricted field level access to the student grade level field (or Students.Grade_Level in the database). For more information, see *Field Level Security*.

Note: Default screening values that are created using the Health Screenings group function are user-specific and only available to the user who created them. Default screening values that are created at the district level (**Start Page > District > Health > Screenings**) are available to all schools within the district.

View Health Screenings

Use this procedure to view health screening information for a selected group of students for a selected date and screening type.

How to View Health Screenings

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the Select Student and Screening Types fields:

Field	Description
Student Selection	Indicate the students you would like to work with by selecting one of the following options: • **Current Selection** (#) • **By Class** (#) By default, the **Current Selection** option is selected. **Note:** The number of students appears in parenthesis next to the **Current Selection** option. Click the number to view the current student selection on the Search Students page. If you select the **By Class** option: 1. Choose which teacher from the **Teacher** pop-up menu. 2. Choose which course from the **Course** pop-up menu. 3. Choose which section from the **Section** pop-up menu. **Note:** Section information includes the course expression, term, and section. Sections are sorted by term, then expression. **Note:** To make the **By Class** option the current selection, click **Make Current Selection**. The class size appears in parenthesis next to the **By Class** option. Click the number to view the current student selection on the Search Students page.

Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Type	Choose which screening type you want to work with from the pop-up menu: • **Hearing** • **Oral Health** • **Scoliosis** • **Tuberculosis** • **Vision and Color** • **Vital Signs/Biometrics**
Select Default Screening Values	For detailed information, see *Set Default Screening Values*.
Columns to Display	Select the checkbox for each column of data you want to display. **Note:** Checkboxes appear based on the **Screening Type** selected. **Note:** Your checkbox selection is retained and available each time you navigate back to this screening type.

5. Click **Next**. The following information displays in the Create Screenings section:

   Note: Once information displays, the button appears as **Refresh Table**.

Field	Description
Entered	If a record already exists for the student for the selected date and screening type, a checkmark appears. Alternately, if a record does not exist for the student for the selected date and screening type, a checkmark does not appear.
Name	The student's name appears. You can click to set screening values for the individual student.

[Columns]	Columns display in the summary table based on the Columns to Display selection.

Set Default Screening Values

Using the Default Values function, you can set default values for each of the following screenings:

- Hearing
- Oral Health
- Scoliosis
- Tuberculosis
- Vision and Color
- Vital Signs/Biometrics

Note: Default values set using the Default Values function override the defaults set by the district.

Note: Once you have entered default screening values for a screening, those default values are retained for future use.

Note: Default screening values are not automatically applied to every student within the selected group. To apply the default screening values and any additional entries or edits you have, you must set the screening values for each student within the selected group. For more information, see *Set Screening Values*.

How to Set Default Screening Values for Hearing

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Hearing** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.

5. Click **Default Values**. The Set Default Screening Values - Hearing drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Right Ear Test Result	Use the pop-up menu to indicate right ear hearing test results, such as Normal, Discharge, Foreign Objects, Cerement, Failure @ 500/25 db, Failure @ 1000/25 db, Failure @ 2000/25 db, Failure @ 4000/25 db, Failure @ 2 or more frequencies, Permanent Disability, or Unable to Test.
Left Ear Test Result	Use the pop-up menu to indicate left ear hearing test results, such as Normal, Discharge, Foreign Objects, Cerement, Failure @ 500/25 db, Failure @ 1000/25 db, Failure @ 2000/25 db, Failure @ 4000/25 db, Failure @ 2 or more frequencies, Permanent Disability, or Unable to Test.
Test Type	Use the pop-up menu to indicate the type of hearing test that was administered.
Hearing Referral Date	Enter the date the student was recommended a hearing aid or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.

Hearing Aid	Enter the type of hearing aid that has been recommended to the student.
Test Conducted Late	Use the checkbox to indicate whether or not the hearing screening was administered on time.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Oral Health

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Oral Health** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Oral Health drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	**Description**

Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Dental Sealants Present	Use the pop-up menu to indicate whether or not the student has received dental sealants, such as Yes or No.
Malocclusion	Use the pop-up menu to indicate whether or not the student has been diagnosed with Malocclusion, such as Yes or No.
History of Caries Present	Use the pop-up menu to indicate whether or not the student has a history of Caries, such as Yes or No.
Untreated Caries Present	If a student has been diagnosed with Caries, use the pop-up menu to indicate whether or not the student has received treatment, such as Yes or No.
Treatment Urgency	Use the pop-up menu to indicate the need for treatment, such as, No obvious problem found, Early dental care is recommended, or Urgent care is needed.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Scoliosis

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Scoliosis** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Scoliosis drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
X-Ray Film Date	Enter the date timestamp of the X-Ray film or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
X-Ray Film Impression	Use the pop-up menu to indicate the severity of the Scoliosis, such as Abnormal, Normal, or No X-Ray.

Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Tuberculosis

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Tuberculosis** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Tuberculosis drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.

Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Skin Test Given Date	Enter the date timestamp the skin test was performed or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Skin Test Read Date	Enter the date timestamp the skin test was read or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Skin Test Type	Use the pop-up menu to indicate the type of skin test that was administered.
In duration Size	Enter the size of the in duration in millimeters (mm).
Skin Test Result	Use the pop-up menu to indicate the results of the impression, such as Positive or Negative.
Chest X-Ray Film Date	Enter the date timestamp of the chest X-Ray film or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Chest X-Ray Impression	Use the pop-up menu to indicate the results of the chest X-Ray impression, such as Normal or Abnormal.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Vision and Color

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Vision and Color** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Vision and Color drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Vision Referral Date	Enter the date the student was recommended a vision aid or click the **Calendar** icon to select a date. Use the **Arrow** icons to select a different month.
Test Conducted Late	Use the checkbox to indicate whether or not the vision screening was administered on time.

Right Eye Vision Test Result	Use the pop-up menu to indicate the results of the right eye test, such as 20/20, 20/30, 20/40, 20/50, 20/70, 20/100, 20/200, 20/20 Corrected, 20/30 Corrected, 20/40 Corrected, 20/50 Corrected, 20/70 Corrected, 20/100 Corrected, 20/200 Corrected, Signs, Permanent Disability, and Unable to Test.
Left Eye Vision Test Result	Use the pop-up menu to indicate the results of the left eye test, such as 20/20, 20/30, 20/40, 20/50, 20/70, 20/100, 20/200, 20/20 Corrected, 20/30 Corrected, 20/40 Corrected, 20/50 Corrected, 20/70 Corrected, 20/100 Corrected, 20/200 Corrected, Signs, Permanent Disability, and Unable to Test.
Color Blind Test Result	Use the pop-up menu to indicate the results of the color blind test, such as Pass, Fail Blue/Yellow, or Fail Red/Green.
Vision Aid	Enter the type of vision aid that has been recommended to the student.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Set Default Screening Values for Vital Signs/Biometrics

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose **Vital Signs/Biometrics** from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values - Vital Signs/Biometrics drawer appears.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Use the following table to enter information in the fields:

   Note: Only enter information in the fields you want to set as default values.

Field	Description
Screening Provider Name	Enter the name of the person or facility that performed the screening.
Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External.
Height	Enter the student's height in inches, if your district is using US units of measure, or meters, if your district is using international units of measure. **Note:** Two decimal places allowed.
Height Percentile	Enter the student's height percentile.
Weight	Enter the student's weight in pounds, if your district is using US units of measure, or kilograms, if your district is using international units of measure. **Note:** Two decimal places allowed.
Weight Percentile	Enter the student's weight percentile.

Weight Status	Use the pop-up menu to indicate the student's weight status, such as Normal, Obese, Overweight, or Underweight.
BMI	The student's Body Mass Index is calculated automatically once a height and weight is entered.
Systolic Blood Pressure	Enter the student's Systolic Blood Pressure.
Diastolic Blood Pressure	Enter the student's Diastolic Blood Pressure.
Resting Heart Rate	Enter the student's resting heart rate.
Temperature	Enter the student's body temperature.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.

7. Click **Save and Close**. The drawer closes.

How to Edit Default Screening Values

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose the screening you want to work with from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.

5. Click **Default Values**. The Set Default Screening Values drawer appears for the selected screening.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Edit information as needed. For field descriptions, see respective *How to Set Default Screening Values for* procedure.
7. Click **Save and Close**. The drawer closes.

How to Revert Default Screening Values to District Defaults

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed, and choose the screening you want to work with from the **Screening Type** pop-up menu. For field description table, see *How to View Health Screenings*.
5. Click **Default Values**. The Set Default Screening Values drawer appears for the selected screening.

   Note: The **Default Values** button does not appear if you have read-only access.

6. Click **Clear User Defaults**.
7. Click **Confirm Clear User Defaults**. The drawer closes.

Set Screening Values

Default screening values are not automatically applied to every student within the selected group. To apply the default screening values and any additional entries or edits you have, you must set the screening values for each student within the selected group. Using the **Save and Next** button, you can set screening values for each student in rapid succession.

Note: Default screening values will not overwrite any existing screening values that have already been entered for a student.

How to Set Screening Values

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed. For field description table, see *How to View Health Screenings*.
5. Click **Next**. Information displays in the Create Screenings section.

   Note: Once information displays, the button appears as **Refresh Table**. If you make changes to the Select Student and Screening Types fields, click **Refresh Table** to update the information that appears in the Create Screenings section.

6. Click the name of the student you want to work with. The Set Screening Values - [Screening Type] drawer appears.
7. Use the following table to edit information in the fields:

Field	Description
[Student]	The student's name.
[Student ID]	The student's student identification number.
[Date of Birth]	The student's date of birth.
View All Screenings	Click to view all screenings for the student. The Screenings tab on the student Health page displays.
Screening Provider Name	Enter the name of the person or facility that performed the screening. **Note:** This setting is retained as you move through PowerSchool.

Screening Date	Enter the screening date or click the **Calendar** icon to select a date.
Grade Level	Use the pop-up menu to indicate the student's grade level when the screening waiver was performed. **Note:** All grade levels for the district appear. By default, the student's current grade level is selected.
Screening Provider Type	Use the pop-up menu to further indicate who performed the screening, such Internal or External. **Note:** This setting is retained as you move through PowerSchool.
[Fields]	For field descriptions, see respective *How to Set Default Screening Values for* procedure.
Screening Outcome	Use the pop-up menu to indicate the decision or action taken as a result of the screening.
Comment	Enter additional information regarding the screening, as needed.
Change Reason	Enter the reason for updating the screening record.

8. Do one of the following:
    - Click **Save and Close**. The drawer closes and screening values are applied to the selected student.
    - Click **Save and Next**. The Set Screening Values - [Screening Type] drawer displays information for the next student in the Create Screenings section.

Delete Screening Records

If a student's screening record was created in error, you can use the Delete function to remove the record. The Delete function is only available if a record already exists for a student indicated by a checkmark in the **Entered** column.

How to Delete a Screening Record

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Health Screenings**. The Health Screenings page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the Select Student and Screening Types fields, as needed. For field description table, see *How to View Health Screenings*.
5. Click **Next**. Information displays in the Create Screenings section.

   Note: Once information displays, the button appears as **Refresh Table**. If you make changes to the Select Student and Screening Types fields, click **Refresh Table** to update the information that appears in the Create Screenings section.

6. Click the name of the student you want to work with. The Set Screening Values - [Screening Type] drawer appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The drawer closes. The checkmark no longer appears next to the student's name in the Create Screenings section.

ID/Password Assignment

Assign ID numbers and passwords to the selected group. You only need to complete the steps for the types of usernames/passwords that you want to create. For instructions specific to assigning PowerLunch IDs, see *How to Create Student Lunch ID Numbers*.

How to Assign an ID/Password

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **ID/Password Assignment**. The Assign Passwords & IDs page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
For	Select the option to indicate for whom you want to assign ID numbers.
Don't overwrite any existing IDs or passwords	Select the checkbox if you do not want to overwrite any IDs or passwords already in PowerSchool.
In case of conflicts append	If there is a conflict with an existing ID, choose a suffix from the pop-up menu.
Assign Student User Names and passwords	Select the checkbox to assign User Names and passwords students.
Assign Access IDs and passwords	Select the checkbox to assign Access IDs and passwords for parents. For more information, see *Assign IDs and Passwords*.
Each User Name/Access ID	Use the first pop-up menu to choose the number of characters for the Web ID. Use the second pop-up menu to choose how the ID number will be generated.
Each Password is	Use the first pop-up menu to choose the number of characters for the password. Use the second pop-up menu to choose how the password will be generated.
Enable access accounts for processed students	Select the checkbox to enable Web access accounts for processed students. Once this checkbox is selected, students will have access to their records in PowerSchool.
Enable access accounts for processed guardians	Select the checkbox to enable Web access accounts for processed guardians. Once this checkbox is selected, guardians will have access to their records on PowerSchool.

5. Click **Submit**. The Changes Recorded page appears
6. Click **Back** to return to the Assign Passwords & IDs page.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

   To notify parents and guardians of their new Access IDs and Passwords, create a form letter that includes the data access tags ^(web_ID) and ^(web_Password). For more information about form letters, see *Form Letters*. For additional information, see *Distribute IDs and Passwords*.

Search for Students by Immunization Compliance

The immunization compliance function provides you with the ability to search for students based on their compliancy status and/or exemption status for one or more vaccines.

How to Search for Students by Immunization Compliance

Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Validation, choose **Immunization Compliance**. The Immunization Compliance page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students	Indicate which students you want to search for by selecting one of the following options: • Select **All active students** to search all students currently enrolled in the selected school. • Select **The selected students** to search only students within the current selection.

Vaccine	Indicate which vaccine(s) you want to evaluate by selecting one of the following options: • Select **Any mandatory vaccines** to evaluate any vaccines. Selecting this option returns students who meet the compliance, exemption, and dose (if specified) parameters for any immunization record. • Select **Only this vaccine** and then choose the vaccine you want to evaluate from the pop-up menu. Selecting this option returns students who meet the compliance, exemption, and dose (if specified) parameters for the immunization record associated with the specified vaccine.
Compliance	Indicate which vaccine compliancy status you want to search for by selecting one of the following options: • Select **Not Compliant** to search for students who are not current for the selected vaccine(s). • Select **Compliant** to search for students who are current for the selected vaccine(s). • Select **Any** to search for students regardless of their vaccine compliancy status.
Exemption	Indicate which vaccine exemption status you want to search for by selecting one of the following options: • Select **Not Exempt** to search for students who are not exempt from the selected vaccine(s). • Select **Exempt** to search for students who are exempt from the selected vaccine(s). • Select **Any** to search for students regardless of their vaccine exemption status.
Doses	To narrow your search by the number of doses of a vaccine that have been received, enter the appropriate number in the **Fewer than** field.

5. Click **Submit**. The Immunization Compliance Results page displays a summary of student immunization compliancy information based on the parameters you selected. The students who appear in this summary have at least one immunization record that meets the specified compliance value and the specified exemption value and contains less than the specified number of doses (if a dose value is entered).
6. Do one of the following:
    - Click **View Current Selection**. The Student Selection page displays the current selection of students.
    - Click **Print Reports for the Current Selection**. The Reports page appears.
    - Click **Go to the student Health screen for the first student in the Current Selection**. The Health page for the selected student appears.

      Note: This option is only available when the Current Selection contains at least one student.

Invalid Requests

The Invalid Request function provides you with the ability to evaluate all course requests for a selected group of students and identify any course requests where prerequisites have not been met. Once students with invalid course requests are identified, you can then research and reconcile those course requests. For course requests that cannot be reconciled, you can perform a number of group functions with those students, such as printing reports or form letters for those students.

Note: To manage prerequisite overrides for individual students, see *Prerequisite Overrides*.

How to View Invalid Requests

Use the following procedure to view invalid course requests for a selected group of students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Invalid Requests**. The Invalid Requests Parameters page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following information to enter parameters in the fields:

Field	Description
Students	The number of students for which you will perform the Invalid Request function.
Re-Evaluate	Do one of the following: • If you recently performed this function and do not expect the list of results to have changed, select the **Don't re-evaluate; display last results** option. This is the quicker option.

	• If this is the first time you have performed this function or you haven't performed it recently, select the **Re-evaluate and display new results** option. Selecting this option may take several minutes to complete as all requests for the selected students are evaluated.
School Year	Select the school year in which you want to check for invalid requests.
Courses	Do one of the following: • Select the **All courses** option to perform the function for all courses within the selected district or school. • Select the **Courses in this department** option to perform the function for all courses within a specific department. Then, enter the department name in the field provided. • Select the **Only this course** option to perform the function for a specific course. Then, enter the course number in the field provided.

5. Click **Submit**. The Invalid Requests page displays the following information for each invalid request:

   Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
Last Name	The student's last name. Click to access the student pages for this student.
First Name	The student's first name. Click to access the student pages for this student.
Course	The number and name of the course the student requested.

Prerequisite	The prerequisite note indicating the course requirement.
Research	To research invalid course request, see *Research Invalid Requests*.
Take Action	To override an invalid course requests, see *Override Invalid Requests*. To edit an invalid course requests, see *Edit Invalid Requests*. **Note:** The icons appear shaded until you perform an action.

6. Click **Re-Evaluate Requests** to apply updates.

   Note: If you navigate away from the Invalid Request page before clicking **Re-Evaluate Requests**, any updates will be discarded.

7. To work with the group of students, click **Make these students the current selection**. The Student Selection page appears.

How to Research Invalid Requests

Use the following procedure to research invalid course requests for a selected student.

1. Perform Step 1 through Step 4 of *View Invalid Requests*. The Invalid Requests page appears.
2. To view historical grades:
   a. Click the **A+** icon. The Historical Grades pop-up window appears.
   b. Click **View/edit in a new window** to update information from the Historical Grades page or click **Close**.
3. To view requests:
   a. Click the **R** icon. The Requests pop-up window appears.
   b. Click **View/edit in a new window** to update information from the Modify Schedule - Requests page or click **Close**.

How to Override an Invalid Request

Use the following procedure to override an invalid course requests for a selected student. Once an override is submitted, it will not appear as an invalid request the next time you re-evaluate requests.

1. Perform Step 1 through Step 4 of *View Invalid Requests*. The Invalid Requests page appears.
2. Click the **O** icon. The Override Prerequisite pop-up window appears.
3. Enter any comments related to the override.
4. Click **Submit**. The Override Prerequisite pop-up window closes.

How to Edit an Invalid Course Request

Use the following procedure to edit an invalid course requests for a selected student.

1. Perform Step 1 through Step 4 of *View Invalid Requests*. The Invalid Requests page appears.
2. Click the **Pencil** icon to edit course request for student. The Change Request pop-up window appears.
3. Do one of the following:
   - Enter a different course number in the **Course Number**, and then click **Submit**. The Change Request pop-up window closes.
   - Click **View/edit in a new window** to update information from the Modify Schedule - Requests page.

List Students

Create a list of selected students. Print the list from your Web browser or export it to another application and print it from there. The latter option gives you more flexibility in formatting and is especially helpful with longer lists. Either way, practice by creating a short list and viewing it before you print or export. This will help you understand how to create a useful longer list.

How to Create a Student List

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **List Students**. The List Students page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a title for the report.
Col.	Numerical representation of the number of items that will appear on the list.
Field Name	Enter the name of the field. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** To number the staff members on the printed list, enter ***count** in the Column 1 **Field Name** field.
Column Title	Enter the column title. This may or may not be the same as the field name. For example, to display birthdays on the printed list, title the column as **Birthday** even though the field name is **DOB**.
Padding in Each Cell	Enter the amount in points of the space between the cell and the text. **Note:** One point equals 1/72 of an inch.
# Rows in Between Breaks	This refers to the number of student names to print before each break in the list. After each break, column titles are printed again. Enter **0** if you do not want breaks inserted.
Gridlines	Select the checkbox to draw lines between rows and columns and to put a border around the list.

Export	Select the checkbox to create the list in another application. If you deselect the checkbox, the list appears in your Web browser only.
Sort Field Name	Enter up to three field names to sort items in the selected columns or fields. Select to sort in ascending or descending order. If you select to sort more than one column/field, PowerSchool sorts them in the order listed. **Note:** If you have never sorted a list before, it is a good idea to try different options here to view how items are ordered each time.

5. Click **Submit**. The page displays the list of students. If the list is formatted correctly, continue to the next step. If not, click **Back**, make the necessary changes, and click **Submit** again to preview the revised list.
6. Choose **File** > **Print** from your Web browser to print the report.

   Note: To fit more students on the page, change the paper layout or use the reduction setting on your Web browser. Choose **File** > **Print**. Make the appropriate selections in the Print dialog.

Mass Enroll in a Class

Enroll an entire group of students in a class.

How to Mass Enroll in a Class

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Mass Enroll**. The Mass Enroll page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions** or by way of the Class Roster.

4. Use the following table to enter information in the fields:

Field	Description

<table>
<tr>
<td>Quick Enroll</td>
<td>
If you know the course number and the specific section of the course you want to enroll the selected students in, you can use the Quick Enroll function.

Enter the course and section number in the Course.Section field. Separate the numbers with a period and no spaces.
Click Enroll. The Enroll Students Preview page appears.

</td>
</tr>
<tr>
<td>Filter By</td>
<td>
If you do not know the course number and the specific section of the course you want to enroll the selected students in, you can use the Filter By function to help you find the section you are looking for.

Enter one or more search criteria:

Period - Choose the period from the pop-up menu.
Term - Choose the term from the pop-up menu.
Teacher - Choose the teacher from the pop-up menu.
Day - Choose the day from the pop-up menu.
Grade - Choose the grade level from the pop-up menu.
Credit Type - Choose the credit type from the pop-up menu, such as Math.
Course - Enter the course number.
Show only classes with available seats - Select the checkbox to display only classes that have not reached the maximum enrollment.

Click Search. Courses appear based on the selection criteria you entered.

Note: Click column headings to sort in ascending order. Click again to sort in descending order. Not applicable for Note and Enrollment columns.
Click the course name you want to select. The Enroll Students Preview page appears.

</td>
</tr>
</table>

5. On the Mass Enroll Preview page, use the following table to verify section and enrollment information and make any necessary corrections prior to enrolling students:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Entry Date</td><td>Defaults to today's date. Click Edit Date to select a different date, if needed.</td></tr>
<tr><td>Section Summary</td><td>Verify the following information:

Course Name - The name of the course.
Course Number - The course number used to identify the course.
Section - The section number used to identify the course.
Term - The term(s) in which the course is being taught.
Fees - Indicates whether or not a fee is associated to the course.
Pending Enrollment Count - The current enrollment in the section plus the number of students below that are about to be enrolled in the section.
Class Status - Indicates reason why student cannot be enrolled into the class:

Number of students selected exceeds section capacity - The number of students in the section plus the students in the selection exceed the maximum section capacity. This is only applicable if the section validates on maximum capacity.
Number of students selected exceeds teacher capacity - The number of students in the section plus the students in the selection exceed the maximum capacity for the main section’s teacher. This is only applicable if the teacher validates on maximum capacity.
Section found - The course.section number you requested was a valid course.section for this school and year.
Section not found - The course.section number you requested was not a valid course.section for this school and year.

</td></tr>
</table>

	• Selected section is not in the current term - Section must be in the current term to mass enroll into it. To override the maximum section capacity: 1. Click **Override**. The Override Section Max pop-up appears. 2. Enter your password in the **Input Section Max Override Password** field. **Note:** This password is set using the **Password required to override a section's maximum enrollment** field on the district Miscellaneous page. 3. Click **OK**. The Override Section Max pop-up closes and the Mass Enroll Preview page refreshes.

Student Enrollment Summary	Verify the following information for each student:
	
	• Student Number - The number used to identify the student.
	• Student Name - The name of the student.
	• Action - Confirmation or warning:
	    • Already enrolled in [course.section] on [enrolldate] - Student is already enrolled in this section, therefore cannot be enrolled in it again. This does not prevent enrollment of other students and sections.
	    • Enroll in [course.section] on [enrolldate] - Confirmation message indicating student (s) will be enrolled in this section on this date.
	    • None - Error in validating one or more sections, such as the number of selected students exceeding the section's maximum capacity.

6. Use the following table to return to the previous page or to enroll students:

Field	**Description**

Back	Click to return to the previous page. Depending on how you accessed the Mass Enroll Preview page, either the Class Roster page or the Mass Enroll page appears. **Note:** If there are section errors that need to be corrected, only this button appears. **Note:** Your student selection is retained when returning to the previous page.
Enroll Students	Click to enroll the students into this class. The Class Roster page displays a confirmation message. **Note:** This button only appears if you access the Mass Enroll Preview page via the Class Roster page or the Mass Enroll page and if there is at least one student to be enrolled and there are no section errors.
Enroll Students and Reschedule	Click to enroll the students into this class. Once enrolled in this class, the Mass Enroll page displays a confirmation message. You can then enroll the students into additional classes using the Quick Enroll or Filter By function. **Note:** This button only appears if you access the Mass Enroll Preview page via the Class Roster page or the Mass Enroll page and if there is at least one student to be enrolled and there are no section errors.

Enroll Students in a Remote/Summer School Class

Sometimes students are eligible to take a course at another school but will not be transferring to that school for all courses. Students may be enrolled in courses at other schools as long as the other schools share your PowerSchool system.

Note: When storing grades for students taking classes at other schools, the TermID fields must match between the schools for those enrollments to store correctly.

How to Enroll Students in a Remote/Summer School Class

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.

2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Mass Remote/Summer School Enrollment**. The Mass Remote/Summer School Enrollment page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Remote enroll currently selected students into a section:	Click to view the Student Selection page.
Show Summer Schools Only	Select the checkbox to narrow the **School Where the Class is Held** pop-up menu to only list summer schools. Otherwise, leave the checkbox blank.
School Where the Class is Held	Choose the school where the class is held from the pop-up menu.
Course	1. Begin entering the name of the course for which you want to enroll the student. A pop-up list of courses matching your entry appears. 2. Select the course for which you want to enroll the student.
Section	A list of sections and information about each section appears. Select the section number of the course for which you want to enroll the student. If the selection section is already at its maximum capacity, the Section is Full drawer appears. Enter the password to override the maximum enrollment and click **Submit**.

Grade	A list of grades for the selected summer school appear. Choose the grade for which you want to enroll the student from the pop-up menu. **Note:** Only appears for summer schools.
FTE	A list of FTEs for the selected summer school appear. Choose the FTE for which you want to enroll the student from the pop-up menu. **Note:** Only appears for summer schools.
Entry Code	A list of entry codes for the selected summer school appear. Choose the entry code for which you want to enroll the student from the pop-up menu. **Note:** Only appears for summer schools.
Enrollment Date	Enter the enrollment date. Defaults to the current date.

5. Click **Submit**. A confirmation message appears.

   Note: If students are already enrolled in the section or enrollment fails, a message to that effect appears.

6. To select the students, click **Make Current Selection**.

Special Programs

Create special programs in PowerSchool and enter students into those programs. Examples of special programs include vocational, resource, home school, or any type of program where students are not in mainstream classes. This function also helps schools keep track of how many students receive state funding for participating in special programs.

To simultaneously enroll more than one student into a special program, see *How to Mass Enroll Students in a Special Program*.

Note: Prior to 10.1.1, when adding a student to a program, a value of 0 was stored in the SpEnrollments.ID column. Now, a unique numeric value is stored to that column. To generate a unique ID for SpEnrollments records with ID = 0, run the Set Special Program

Enrollment ID function via **System > Special Operations**. No code or password is required to run it.

How to View Special Programs

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.

The chart tells you in which programs the student participates, date of the student's entry into the program, exit date, and exit code indicating why the student left the program. Links to the program name and entry date provide more details on these items. If there is no program noted at the top of the page, the selected student does not participate in a special program.

How to Add a Student to a Program

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.
3. Click **New**. The New Special Program Enrollment page appears.
4. Use the following table to enter information in the fields:

Field	Description
Comment	Enter any notes related to the student's participation in the special program (optional).
Entry Date	Enter the date the student entered the program using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the exit date (optional), which is the first day the student was not active in the program. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you

	submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Reason	Enter the code that describes why the student exited the program (optional).
Program	Choose the program from the pop-up menu. **Note:** For more information about the listed programs, click **Program**.

5. Click **Submit**. The Changes Recorded page appears.

How to Edit a Student in a Program

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.
3. Click the student's entry date for the program you want to edit. The Edit Special Program Enrollment page appears.
4. Edit the information as needed. For field description, see *How to Add a Student to a Program*.
5. Click **Submit**. The Changes Recorded page appears.

How to Delete a Student From a Program

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Special Programs** from the student pages menu. The Special Programs page appears.
3. Click the student's entry date for the program you want to delete. The Edit Special Program Enrollment page appears.
4. Click **Delete** to delete the student from the program. The Changes Recorded page appears.

How to Mass Enroll Students in a Special Program

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Enrollment, choose **Mass Enroll Special Program**. The Mass Enroll Special Program page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	**Description**
Program	Choose the special program into which you want to enroll the selected students from the pop-up menu.
Entry Date	Enter the date the students entered the program using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Date	Enter the exit date (optional), which is the first day the student was not active in the program. Use the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Exit Code	Enter the code that describes why the students exited the program (optional).
Comment	Enter any comments related to the student's participation in the special program. The comment appears on the Special Programs student page for each student.

5. Click **Submit**. The Alert page displays the message "Mass enroll successful."

Next School Indicator

Set one school as the default school to which the selected group of students graduates when they leave your school. This saves you from having to display each student record to mark the student's next school.

Indicate which students will attend your school next year. The school you select determines from which student course request pages the students will make their selections.

Suppose you work at a high school that includes grades 9 through 12. In order to include the eighth graders, who will be ninth graders in the fall, change their next school to your school. To exclude the twelfth graders, change their next school to **Graduated students**.

Note: Don't forget to set the **Next School Indicator** field for students who are continuing at your school next year.

If there is more than one school that your students often graduate to or move to, you may want to set up additional next schools. For more information, see *Next School*.

How to Change a Next School Indicator

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Next School Indicator**. The Next School Indicator page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the default next school from the pop-up menu.
5. Click **Submit**. The Changes Recorded page appears.
6. Click **Back** to return to the Next School Indicator page.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

Quick Export

This method quickly produces a simple list of students and information from the Student table. Change the parameters to produce a more detailed list. For more information about exporting, see *How to Export Using a Template*.

In addition to exporting data, SIS Views provide quick access to key metrics and not just raw data. For detailed information, see the *Data Dictionary SIS Views* available on PowerSource.

How to Use Quick Export

Note: The Quick Export page is now also accessible via **Start > System > Page and Data Management > Quick Export**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Quick Export**. In most cases, you will not need to change the default options on the Export Students page, in which case you can skip the next step. To change the selections, proceed to the next step.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
[Fields to be Exported]	Enter the fields to be included on the exported spreadsheet. Enter as many fields as needed. Enter only one field per line. Separate multiple fields with a hard return. To insert a PowerSchool field into this field: 1. Click **Fields** at the bottom of the page to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** Database extension fields can be selected on the **Fields** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.

Field Delimiter	A field delimiter separates fields (or "columns") in the exported data. Use the pop-up menu to choose how you want the system to separate each field in the export file: • **Tab** • **Comma** • **None** • **Other**: Enter the delimiter in the blank field.
Record Delimiter	A record delimiter separates records (or "rows") in the exported data. Use the pop-up menu to choose how you want the system to separate each record in the export file: • **CR**: Carriage return • **CRLF**: Carriage return and line feed • **LF**: Line feed • **Other**: Enter the delimiter in the blank field.
Surround Fields	Select the checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select the checkbox to include column titles on the first row of the exported data.
Export DCID	Select the checkbox to export the Student table's unique identifier.

5. Click **Submit**. The exported data appears.
6. Choose **File > Save As...** to save the file. Open the saved file using a spreadsheet application, such as Excel or Lotus 1-2-3. Format, print, and save it as any other spreadsheet document.

Student Field Value

Set a specific field value for students who have the field attached to their records. For example, if a group of students has the wrong ethnicity code attached to their names, you can change the field value for all these students at the same time.

Be certain you want to replace all the values for all these students. This procedure is irreversible. In fact, you are encouraged to make a backup of your data before changing field values for a group.

Note: For information about staff field values, see *How to Set Staff Field Value*.

How to Set a Student Field Value

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Student Field Value**. The Student Field Value page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Field to Change	Enter the name of the field to be changed. **Note:** For a complete list of field codes, click **Fields**. **Note:** ID, Student_Web_ID and Web_ID are not available for mass updating using the **Student Field Value** function. To fill these values for multiple students, use the Assign IDs/Passwords procedure.
New Field Value	Enter the new value of the field. Put quotation marks around any values that do not perform calculations, such as constant characters or a string of characters.
Clear Field Value	Select the checkbox if you want to remove any existing values for that field.
Do not overwrite existing data	Select the checkbox if you do not want the system to overwrite any existing field values.

Warning: Be sure you have entered information correctly, as this procedure is irreversible.

5. Click **Submit**. The Field Value page displays a preview of the records and fields that will be affected.
6. Click **Submit**. When the operation is complete, click Back. Now you can perform a search to find the group with the changed value.

   If you find that the values were wrongly changed, you must change each record individually. You cannot retrace your steps by changing the value back to what it was for the entire group, because there are those students to whom the value was assigned before you changed the value for the others. Reversing the procedure will change the value for all students, not just the group you selected.

Student Schedule Reports

How to Run the Student Schedule List Report

Use the Student Schedule List report to view the number of courses scheduled by each student. You can also use this report to view each student's schedule.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student Schedule List**. The Student Classes Scheduled page appears.
4. Use the following table to enter information in the fields:

Field	Description
Students to Include	Number of students included in scheduling for next year. If a student or group of students have been selected, choose to run the report for only that student selection or for all students. In the **Include Only In Grades** field, enter the numbers of the grade levels you want to include in this report (optional).
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale. For more information, see *Report Output Locale*.

	Note: Clicking on hyperlinks within the report may display a different page in PowerSchool, which will appear in your preferred language and not in the locale you selected for the report output.

5. Click **Submit**. The report displays the following information:

Field	Description
#	The numbered list of students.
Student	The student's name. Click the heading to sort the list by student name.
% Scheduled	The percent of the period/term combinations that were fulfilled. Click the heading to sort the list by percentage scheduled.
Classes Scheduled	The number of courses that have been scheduled for this student. Click the heading to sort the list by the number of classes scheduled. Click the number per student to view the student's Schedule page.

How to Run the Student Schedule Report

The Student Schedule Matrix allows you to produce and print student schedule reports with page breaks between students. Though this report can be viewed with Safari for Mac OS X and Microsoft Internet Explorer for Windows, other browsers may not display the report formatting appropriately.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Tools, choose **Reports** from the PowerScheduler menu. The Scheduling Reports page appears.
3. Click **Student Schedule Report**. The Student Schedule Matrix Report page appears.
4. Use the following table to enter information in the fields:

Field	Description

Report Title	Enter a title for the report.
Term to Display	Select from the pop-up menu which term to use for the report.
Students to scan	Select an option to indicate the students to include, if applicable.
Max Students per Page	Enter the maximum number of student reports to display per page.
Sort Order	Select an option to indicate the sort order: • **Last Name** • **(Next Year) Grade Level** • **Homeroom**
Show Other-School Enrollments	Select the checkbox to display any enrollments at other schools. The enrollments are based on the selected scenarios.
Color Sections By:	Select an option for the report colors: • **No Coloring**: Report displays no coloration. • **Section**: Report displays sections in the same color. • **Course**: Report displays courses in the same color.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

5. Click **Submit**. The Student Schedule Matrix appears.

How to Run the Student Schedule Matrix Report

The Student Schedule Matrix allows you to produce and print student schedules for the current year with page breaks between students. Though this report can be viewed with Safari for Mac OS X and Microsoft Internet Explorer for Windows, other browsers may not appropriately display the report formatting.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Student Schedule Report**. The Student Schedule Matrix Report page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a title for the report.
Students to scan	Select an option to indicate the students to include, if applicable.
Max Students per Page	Enter the maximum number of students to display per page.
Sort Order	Select an option to indicate the sort order.
Include Active Enrollments As Of	Enter a date to filter report results by the specified date of active enrollments. Use the format mm/dd/yyyy or mm-dd-yyyy.
Show Dropped Enrollments in Separate List	Select the checkbox to display a student's dropped enrollments below the student's matrix. A Withdrawn Classes table displays the enrollment information for each dropped course, including the date of withdrawal.
Bell Schedule for Period Start/End Times	Select from the pop-up menu which bell schedule to use to display the start and end times for each period.
Color Sections By:	Select an option for the report colors:

	• **No Coloring**: Report displays no coloration. • **Section**: Report displays sections in the same color. • **Course**: Report displays courses in the same color.

5. Click **Submit**. The Student Schedule Matrix appears.

Tips for Printing the Student Schedule Matrix Report

- Enable the printing of backgrounds. Shading and colorations in reports are all considered backgrounds. Not printing backgrounds may lead to illegible printouts.
- Turn off the printing of header information in your browser settings. If this is not off, each page printed may include the URL of this page, a page number, and a time stamp. These are generally not desired for this report.
- Use your browser's Print Preview function to confirm that the output is correct prior to sending to the printer. You may adjust text size using the text font size controls of your browser. You may also control the page orientation using your browser settings to fix table cells that span page breaks or reports that print too small.

Student Screens

Using the Student Screens page, formerly known as the Counselor's Screen page, you can quickly access direct links to some of the most frequently requested information and functions for a selected group of students.

How to View Student Screens

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Choose **Student Screens**. The Student Screens Menu page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the page you want to view for the selected students from the pop-up menu:
   - **Quick Lookup**
   - **Access Accounts**

- **Addresses**
- **Demographics Modify**
- **Auto Email Reports**
- **Emergency/Medical**
- **Health - Immunizations**
- **Health - Screenings**
- **Health - Office Visits**
- **Health - Grade Level Entry Certification**
- **Modify Info**
- **Other Information**
- **Parents**
- **Photo**
- **Attendance**
- **Enter Attendance**
- **Cumulative Info**
- **Graduation Progress**
- **Historical Grades**
- **Standards**
- **Teacher Comments**
- **Term Grades**
- **Test Results**
- **Truancies**
- **District Specific**
- **Fee Transactions**
- **Log Entries**
- **Lunch**
- **Lunch Transactions**
- **Net/Phone Access**
- **SEOP Review**
- **Incidents**
- **Activities**
- **All Enrollments**
- **Functions**
- **Special Programs**
- **Transfer Info**
- **Bell Schedule View**
- **List View**
- **Matrix View**
- **Modify Schedule**
- **Manage Requests**

5. Click **Submit**. The Student Screens page appears. The selected students appear in the students menu.
6. Do one of the following:
    - Click a student's name to display the selected student screen.
    - Click the icon next to the student's name to display the last student page viewed.

Transfer Students

In PowerSchool, you have different options concerning transfers into and out of your school. You can transfer a student out of school, transfer a student to or enroll a student in another school on your PowerSchool server, or reenroll a student who was previously enrolled in your school.

How to Transfer a Student Out of School

Use this function to transfer an individual student out of your school.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Functions** from the student pages menu. The Functions page appears.
3. Click **Transfer Out of School**. The Transfer Student Out page appears.
4. Use the following table to enter information in the fields:

Field	Description
Who will be transferred out	The names of the selected students appear.
Transfer Comment	Enter any comments related to the transfer.
Date of transfer	Enter the date of the transfer. When transferring a student out of school who has any attendance records on or after the date of transfer, a message appears stating "There are [number] attendance record(s) for the current student. Listed below are the number of records per date." The transfer is prevented until the future attendance records are deleted. To delete the future attendance records,

	select the **Check to delete all future attendance records this student has listed above** checkbox. **Note:** The **Check to delete all future attendance records this student has listed above** checkbox only appears for users who have access to enter attendance.
Exit code	Choose the exit code from the pop-up menu.
Check here if students intend to enroll in school during next school year.	Select the checkbox if the student plans to return to the same school during the next school year. Deselect the checkbox to clear all scheduling-related information for the following year, including course requests, for the selected students.
Also Transfer out of selected programs	If the student is currently enrolled in any special programs, these programs appear. Select those which the student should be withdrawn from when they are transferred.

5. Click **Submit**.
6. Click **Confirm Submit**. PowerSchool notifies you that the student has been transferred.

   Note: The student's enrollment status will appear as Transfer Out Pending until the date of transfer.

   Note: The student's status is now inactive. From now on, when you want to open the student record, you must enter a forward slash (**/**) before the student's last name when entering it in the **Student Search** field.

   If you know that the student is transferring to another school that shares your PowerSchool system, you must also transfer the records to that school before the student can be enrolled there. For more information, see *How to Transfer to Another School*.

How to Transfer a Group of Students Out of School

Use this function to transfer a group of student out of your school. It is especially useful when a family moves and you want to transfer all siblings at once.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Enrollment, choose **Transfer Out of School**. The Transfer Out of School page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Edit the information as needed. For field descriptions, see *How to Transfer a Student Out of School*.
5. Click **Submit**. PowerSchool notifies you that the student has been transferred.

   Note: The students' status is now inactive. From now on, when you want to open the student records, you must enter a forward slash (**/**) before the students' last name when entering it in the **Student Search** field.

   If you know that the group is transferring to another school that shares your PowerSchool system, you must also transfer the records to that school before the students can be enrolled there. For more information, see *How to Transfer to Another School*.

How to Reenroll in School

Reenroll a student in your school after he or she has previously left. You cannot transfer a student to your school while that student is still enrolled at another school on your system. The transferring school must also be on the same PowerSchool system as your school.

Note: If the student is transferring from a school that uses the same PowerSchool system as yours, the sending school must transfer the student to your school before you can reenroll that student.

To reenroll a group of students, see *How to Reenroll a Group of Students*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Functions** from the student pages menu. The Functions page appears.
3. Click **Reenroll in School**. The Reenroll a Student page appears.
4. Use the following table to enter information in the fields:

Field	Description
Student to Reenroll	The selected student appears.
Date of Reenrollment	Enter the date of the reenrollment.
Entry Code	Choose the reason for the enrollment from the pop-up menu.
Entry Comment	Enter any comments related to the reenrollment.
Grade Level	Choose the student's current grade level from the pop-up menu.
Restore class enrollments?	Choose either **Yes** or **No** from the pop-up menu. Restoring the enrollments creates new enrollment records and aids in reports, such as the Enrollment by Section report.
Full-Time Equivalency	Choose the multiplier to calculate full-time equivalency from the pop-up menu.
Membership Share	Choose the multiplier to calculate the membership share from the pop-up menu.
Tuition Payer	Choose the method of tuition payment from the pop-up menu.
Special Enrollment Code	Choose an enrollment code from the pop-up menu.
Enrollment Type	Choose an enrollment type from the pop-up menu.

5. Click **Submit**. PowerSchool notifies you that the student has been reenrolled.

How to Reenroll a Group of Students

Reenroll a group of students into your school. You cannot transfer students to your school while they are still enrolled at another school on your system. The transferring school must also be on the same PowerSchool system as your school.

Note: If the student is transferring from a school that uses the same PowerSchool system as yours, the sending school must transfer the student to your school before you can reenroll that student.

To reenroll an individual student, see *How to Reenroll in School*.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Enrollment, choose **Re-Enroll in School**. The Re-Enroll in School page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Who will be reenrolled	The selected number of students appears.
Date of re-enrollment	Enter the date of the reenrollment.
Entry Code	Choose the reason for the enrollment from the pop-up menu.
Entry Comment	Enter any comments related to the reenrollment.
Track	Select one of the following options to indicate whether to change the students' track: • **Keep existing track**: Retains the students' track.

	• **Change all to track**: Moves the students to the track selected from the pop-up menu.
District of Residence	Select one of the following options to indicate whether to change the students' district of residence: • **Keep existing District of Residence**: Retains the students' district of residence. • **Change all to District**: Moves the students to the district selected from the pop-up menu. **Note:** For more information about districts of residence, see *Districts of Residence*.
Restore class enrollments?	Choose either **Yes** or **No** from the pop-up menu. Restoring the enrollments creates new enrollment records and aids in reports, such as the Enrollment by Section report.
If more than one student is being re-enrolled	Select the checkbox to verify that you want to re-enroll the selected students.

5. Click **Submit**. PowerSchool notifies you that the students have been reenrolled.

How to Transfer to Another School

Transfer a student to another school after you have transferred him or her out of your school. You cannot transfer a student to another school while that student is enrolled at another school on your system. The receiving school must also be on the same PowerSchool system as your school.

Note: Once you transfer the student to another school, you will not be allowed to view any of his or her records unless you have district-level access.

1. On the start page, search for and select a student. For more information, see *Student Search*. Remember to use the forward slash (**/**) before the student's last name, as the student is now inactive at your school.
2. Under Enrollment, choose **Functions** from the student pages menu. The Functions page appears.

3. Click **Transfer to Another School**. The Transfer to Another School page appears.
4. Choose the receiving school from the **To which school?** pop-up menu.
5. Click **Submit**. PowerSchool notifies you that the student is enrolled at another school.

   If the system finds a student at the new school with the same last name or phone number, the Check for Duplicate Students page displays these students. You can then click each student's name to ensure that the student you are transferring is not already enrolled at the new school.

   It is the responsibility of the receiving school to activate the student's records and schedule his or her classes. For more information, see *How to Enroll a Student*.

How to Enroll a Student in a Remote/Summer School Class

Sometimes a student is eligible to take a course at another school but will not be transferring to that school for all courses. Students may be enrolled in courses at other schools as long as the other schools share your PowerSchool system.

Note: When storing grades for students taking classes at other schools, the TermID fields must match between the schools for those enrollments to store correctly.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Functions** from the student pages menu. The Functions page appears.
3. Click **Enroll Student in Remote/Summer School Class**. The Enroll Student in Remote/Summer School Class page appears.
4. Use the following table to enter information in the fields:

Field	Description
Student	The selected student appears.
Show Summer Schools Only	Select the checkbox to narrow the **School Where the Class is Held** pop-up menu to only list summer schools. Otherwise, leave the checkbox blank.
School Where the Class is Held	Choose the school where the class is held from the pop-up menu.

Course	1. Begin entering the name of the course for which you want to enroll the student. A pop-up list of courses matching your entry appears. 2. Select the course for which you want to enroll the student.
Section	A list of sections and information about each section appears. Select the section number of the course for which you want to enroll the student. If the selection section is already at its maximum capacity, the Section is Full drawer appears. Enter the password to override the maximum enrollment and click **Submit**.
Grade	A list of grades for the selected summer school appear. Choose the grade for which you want to enroll the student from the pop-up menu. **Note:** The value is preset if the student has a reenrollment record for the selected summer school and the current term. **Note:** Only appears for summer schools.
FTE	A list of FTEs for the selected summer school appear. Choose the FTE for which you want to enroll the student from the pop-up menu. **Note:** The value is preset if the student has a reenrollment record for the selected summer school and the current term. **Note:** Only appears for summer schools.
Entry Code	A list of entry codes for the selected summer school appear. Choose the entry code for which you want to enroll the student from the pop-up menu. **Note:** The value is preset if the student has a reenrollment record for the selected summer school and the current term. **Note:** Only appears for summer schools.

Enrollment Date	Enter the enrollment date. Defaults to the current date.

5. Click **Submit**. A confirmation message appears.

How to Create a New School Enrollment

Create a new school enrollment to record a change in a student's status without exiting or re-enrolling the student. When using this function to create a new enrollment, a previous enrollment is created simultaneously, which is especially helpful in situations where a student's enrollment information (such as the track or district of residence) changes midway through the school year. By creating a new school enrollment, the previous and current information are saved as two separate enrollments. This result is particularly beneficial for reporting purposes.

Information in the exit-related fields is saved as a "reenrollments" record that will be created and filled with the information from the student's current enrollment and will become the student's previous enrollment. The remaining fields (other than any state-specific fields that may appear at the bottom of the page) define the student's current enrollment.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Enrollment, choose **Functions** from the student pages menu. The Functions page appears.
3. Click **Create New School Enrollment**. The New School Enrollment Info page appears.
4. Use the following table to enter information in the fields:

Field	Description
Exit Date	Enter the exit date, which is the first day the student's enrollment is not active or the day after the student transferred out.
Exit Code	Choose a reason for the transfer from the pop-up menu.
Entry Date	Enter the date the student was enrolled.
Entry Code	Choose a reason for the transfer from the pop-up menu.

Full-Time Equivalency	Choose the student's FTE from the pop-up menu for this school enrollment. FTE is a grouping that associates a student's school enrollment with a set of attendance conversion values. When ADA runs, for a student, it runs for each school enrollment during the report dates. When processing each school enrollment, it uses the student's FTE to locate the set of attendance conversions to use when looking up the attendance value for the day. For more information, see *Full-Time Equivalencies*.
Grade Level	Choose the student's grade level at the time of the transfer from the pop-up menu.
Track	Choose the student's track from the pop-up menu. For more information, see *Calendar Setup*.
District of Residence	Choose the district in which the student lives from the pop-up menu. For more information, see *Districts of Residence*.
Comment	Enter a comment to describe the reason for the enrollment modifications, such as **Moved from part-time to full-time status**. The comment will appear for both the current and previous enrollments on the student's Transfer Information page. For more information, see *Transfer Information*.

Note: State-specific fields may appear at the bottom of the page, depending on your state. For state reporting documentation, visit PowerSource.

5. Click **Submit**. The Changes Recorded page appears.

Student Attachments

Setup

Configure Document Attachments Settings

Prior to working with document attachments, document attachments settings must be configured.

Note: These settings are initially configured during the PowerSchool installation process. For more information, see the *PowerSchool Installation and Configuration Guides* available on PowerSource.

How to Configure Document Attachments Settings - External Access

Note: These fields are populated with the **Server Host name or IP Address** and **Port** information entered for PowerSchool Configuration - External Access.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the Document Attachments Settings - External Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.
6. Click **Submit**.

How to Configure Document Attachments Settings - Internal Access

Note: These fields are populated with the **Server Host name or IP Address** and **Port** information entered for PowerSchool Configuration - Internal Access.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the Document Attachments Settings - Internal Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.
6. Click **Submit**.

Document Attachment Size Limits

In order to provide better control over the documents that are uploaded to the student record, PowerSchool provides you with the ability to configure the maximum size limit for all documents and all students. This way, documents pushed to PowerSchool during student enrollments by "PowerSchool Registration" can be balanced against the system's available space.

How to Configure Document Attachment Size Limits

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Document Attachment, click **Configuration**. The Document Attachment Configuration page appears.
3. Use the following table to enter information in the Size Limits section:

Field	Description
Set Per Student Limit	Select the checkbox to limit the number of attachments (measured in megabytes) that can be uploaded to the district server per student. **Note:** This setting may be used in conjunction with the **Set Per Document Limit** setting.
Per Student Maximum Size	Enter the maximum size (measured in megabytes) that can be uploaded to the district server per student. The default is set to 10MB.
Set Per Document Limit	Select the checkbox to limit the size of attachments (measured in megabytes) that can be uploaded to the district server. **Note:** This setting may be used in Contribute with the **Set Per Student Limit** setting.
Per Document Maximum Size	Enter the maximum size of an attachment (measured in megabytes) that can be uploaded to the district server. The default is set to 1 MB.

Total District Storage	The district's total amount of storage available for document attachments. **Note:** This value is set as a pref during the installation of PowerSchool.
[Students Supportable]	The total number of students that can be accommodated by the Total District Storage (perstudentquota/studentsizelimit).
[Documents Supportable]	The total number of documents that can be accommodated by the Total District Storage (perdocumentquota/docuementsizelimit).

5. Click **Submit**. A confirmation message appears.

Document Attachment Categories

Document attachment categories are used as an organizational tool to group document attachments.

Note: Category names must be unique and cannot contain commas.

How to Add a Document Attachment Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Document Attachment, click **Configuration**. The Document Attachment Configuration page appears.
3. Scroll to the Categories section.
4. Click **Add**. The Edit Category drawer appears.
5. Use the following table to enter information in the fields:

Field	Description
Category Name	Enter a name of the document attachment category.
Category Description	Enter a description of the document attachment category. **Note:** No more than 200 characters may be entered.

<table>
<tr>
<td>Default Permissions</td>
<td>
Indicate the default settings for the document attachment category by select one or more of the following:

Select the Download checkbox to allow a user to download attachments for a given category.
Select the Update Details checkbox to allow a user to edit attachments for a given category.
Select the Delete checkbox to allow a user to delete attachments for a given category.

Note: The effective permissions are determined by identifying the roles, categories and access levels assigned to a given document attachment.
For example, if Role A has the following categories (assuming full Page Level Permissions and all categories assigned to one or more documents), the users effective permissions are Edit only.
<table>
<tr><th>Cat</th><th>Edit</th><th>Download</th><th>Delete</th></tr>
<tr><td>A</td><td>X</td><td></td><td></td></tr>
<tr><td>B</td><td>X</td><td>X</td><td></td></tr>
<tr><td>C</td><td>X</td><td>X</td><td>X</td></tr>
</table>
For example, if Role B has the following categories (assuming full Page Level Permissions and all categories assigned to one or more documents), the users effective permissions of None (no access).
<table>
<tr><th>Cat</th><th>Edit</th><th>Download</th><th>Delete</th></tr>
<tr><td>A</td><td></td><td>X</td><td></td></tr>
<tr><td>B</td><td>X</td><td></td><td></td></tr>
<tr><td>C</td><td>X</td><td>X</td><td>X</td></tr>
</table>
If a user is assigned both Roles (A and B) then the effective permissions would be Edit only, because Role A has Edit only.
Note: For more information, see User Access.
</td>
</tr>
</table>

5. Click **Submit**. The Edit Category drawer closes and a confirmation message appears.
6. Note the new document attachment category appears on the Categories page in alphabetical order.

How to Edit a Document Attachment Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Document Attachment, click **Configuration**. The Document Attachment Configuration page appears.
3. Scroll to the Categories section.
4. Click the **Edit** icon of the document attachment category you want to edit. The Edit Category drawer appears.
5. Edit the information as needed. For field descriptions, see *How to Add Document Attachment Category*.
6. Click **Update Details**. The Edit Category drawer closes and a confirmation message appears.

How to Delete a Document Attachment Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Document Attachment, click **Configuration**. The Document Attachment Configuration page appears.
3. Scroll to the Categories section.
4. Click the **Delete** icon of the document attachment category you want to delete. The Delete Category drawer appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Delete Category drawer closes and a confirmation message appears.

Assign Categories to User Access Roles

To control user access of document attachments, you can assign categories with roles. For more information, see *User Access*.

Work with Students

Student Attachments

Using the Student Attachments page, you can upload attachments for a selected student. Once an attachment is uploaded, you can view, download or delete attachments as needed.

How to Add an Attachment

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page appears.
3. Click **Add**. The Attach drawer appears.
4. Click **Browse...**. A pop-up appears.
5. Select the files you want to upload. The file information appears in the Attach drawer.

   Note: The Files Not Selected pop-up appears if there is an issue with one or more of the selected files. The pop-up displays the number of files not selected and the issues related to those files. The files that are not selected remain in the Attach drawer even after you click Attach so that you may try to attach them after the issues have been corrected.

6. Use the following table to enter information in the fields:

Field	Description
[Warning]	If there is an issue, a warning message may appear. Address the warning if needed. The warning message no longer appears once you continue working within the Attach drawer.
[Error]	If there is an error, an error message may appear. Address the error if needed. The warning message no longer appears once you continue working within the Attach drawer.
[Arrow]	Click to expand the section. Click the arrow again to condense the section.
File	The name of the file. **Note:** The first file appears expanded.

[Remove]	Click to remove the file from the Attach drawer.
File Size	The size of the file.
Title	Enter the title of the attachment.
Notes	Enter any additional information that you want to include about the attachment.
Categories	Document attachment categories are used as an organizational tool to group document attachments. Do one of the following: • Select the checkbox next to each category you want to apply to the attachment. • Deselect the checkbox next to each category you do not want to apply to the attachment.

7. Do one of the following:
    - Click **Browse...** to select additional files. Go to Step 5 to continue.
    - Click **Attach**. The Attach drawer closes and a confirmation message appears.

How to Filter Attachments

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list of attachments, use the following table to enter information in the Filter section:

    Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	Description
File Name	1. Choose **File Name** from the first pop-up menu.

	2. Enter the file name of the attachment in its entirety or in part.
Title	1. Choose **Title** from the first pop-up menu. 2. Enter the title of the attachment in its entirety or in part.
Category	1. Choose **Category** from the first pop-up menu. 2. Choose the category of the attachment from the second pop-up menu.
File Size	1. Choose **File Size** from the first pop-up menu. 2. Choose one of the following from the second pop-up menu: • **>** (greater than) • **<** (less than) 3. Enter the file size. 4. Choose one of the following from the third pop-up menu: • **Byte** • **KB** • **MB** • **GB**
Quota Used by Student (Percentage)	1. Choose **Quota Used by Student (Percentage)** from the first pop-up menu. 2. Choose one of the following from the second pop-up menu: • **> =** (greater than or equal to) • **<** = (less than or equal to) 3. Enter the percent of quota used by student.
Date	1. Choose **Date** from the first pop-up menu. 2. Choose one of the following from the second pop-up menu: • **<** (less than) • **=** (equal to) • > (greater than)

	3. Enter the date from which you want to search attachments. **Note:** You can also click the **Calendar** icon and select a date.
Uploaded By	1. Choose **Uploaded By** from the first pop-up menu. 2. Enter the name of the user who uploaded the attachment in its entirety or in part. **Note:** If entering the name of the user in part, it must match the sub-string format of last, first. For example, "smith, b" will return search results. However, "smi, b" will not.

4. To add another filter, click **+** and repeat Step 5.
5. To delete a filter, click **-** next the filter.
6. Click **Apply**. The total number of attachments, approximate size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: To remove all filter selections, click **Clear**.

How to View Attachments

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by File Name then Date.

Field	Description

[Attachment]	Do one or more of the following: - Select the checkbox in the header row to select all attachments. - Deselect the checkbox in the header row to deselect all attachments. - Select the checkbox next to each attachment you want to work with. - Deselect the checkbox next to each attachment you do not want to work with. - Press **SHIFT** while selecting multiple checkboxes, which automatically selects all checkboxes between your first and last selection. **Note:** Your checkbox selections are retained as you navigate through the different pages of the search results.
File Name	The file name of the attachment.
Title	The title of the attachment.
Categories	The categories applied to the attachment.
File Size	The file size of the attachment.
Date	The date and time the attachment was uploaded.
Uploaded By	The name of the user or plugin who uploaded the attachment.
Actions	Do one of the following: - Click the **Information** icon to view attachment details. For more information, see *How to View Attachment Details*. - Click the **Information** icon to edit attachment details. For more information, see *How to Edit Attachment Details*. - Click the **Download** icon to download the attachment. For more information, see *How to Download an Attachment*.

[Pagination]	Use to navigate the search results.
Page # of #	By default, the page you are viewing displays. To jump to another page, enter the page number and press **ENTER** or **RETURN**.
Rows/Page	By default, ten attachments display per page. To view more attachments per page, enter the number and press **ENTER** or **RETURN**. **Note:** Viewing a large number of rows per page can cause browser slowness or scripting errors.

How to View Attachment Details

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by File Name then Date.

4. Click the **Information** icon. The Information drawer displays the following information:

Field	Description
Title	The title of the attachment. For more information, see *How to Edit Attachment Details*.
File	The name of the attachment.
Size	The file size of the attachment (in KB, MB, GB).

Date	The date and time the attachment was uploaded.
Uploaded By	The name of the user or plugin who uploaded the attachment.
Notes	Any additional information about the attachment. For more information, see *How to Edit Attachment Details*.
Categories	The categories applied to the attachment. For more information, see *How to Edit Attachment Details*.
Download	Click to download the attachment. For more information, see *How to Download the Attachment from the Information Drawer*.

How to Edit Attachment Details

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by File Name then Date.

4. Click the **Information** icon. The Information drawer appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Title	The title of the attachment. Edit as needed.
Notes	Any additional information about the attachment. Edit as needed.

Categories	Document attachment categories are used as an organizational tool to group document attachments. Do one of the following: • Select the checkbox next to each category you want to apply to the attachment. • Deselect the checkbox next to each category you do not want to apply to the attachment.

6. Click **Update Details**. The Information drawer closes and a confirmation message appears.

How to Download an Attachment from the Attachments Page

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by File Name then Date.

4. Click the **Download** icon next the attachment you want to download.
5. Save the file to your desktop (varies depending on your browser).

How to Download the Attachment from the Information Drawer

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by File Name then Date.

4. Click the **Information** icon. The Information drawer appears.
5. Click **Download**.
6. Save the file to your desktop (varies depending on your browser).
7. Click **Close** to close the Information drawer.

How to Delete an Attachment

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Attachments** from the student pages menu. The Student Attachments page displays.
3. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by File Name then Date.

4. Do one of the following:
   - Select the checkbox in the header row to select all attachments.
   - Select the checkbox next to each attachment you want to work with.
5. Click **Delete**. The Confirm Delete pop-up appears.
6. Click **Confirm Delete**.

   Note: The selected document attachments will be deleted regardless of whether you remain on the Student Attachments page, navigate to another page or close the browser.

Work with Student Groups

Student Attachments

Using the Search Attachments group function, you can access a list of all attachments for a selected group of students that have been uploaded using the Student Attachments page from the student pages menu. Each attachment displays as a line item in the search results. You can view, download or delete attachments as needed.

How to Search Document Attachments

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Search Attachments**. The Search Attachments page appears.
4. To narrow the list attachments, click the **Filter Results** arrow. The Filter Results section appears.
5. Use the following table to enter information in the fields:

Field	Description
Student Name	Enter the name of the student for which you want to search attachments.
File Name	Enter the file name of the attachment in its entirety or in part.
Title	Enter the title of the attachment in its entirety or in part.
Category	The category applied to the attachment.
File Size	Using the first pop-up menu, choose one of the following: • **>=** (greater than or equal to) • **<=** (less than or equal to) In the field, enter the file size. Using the second pop-up menu, choose one of the following: • **Byte** • **KB** • **MB** • **GB**

Quota Used by Student (Percentage)	1. Choose **Quota Used by Student (Percentage)** from the first pop-up menu. 2. Choose one of the following from the second pop-up menu: • **> =** (greater than or equal to) • **<** = (less than or equal to) 3. Enter the percent of quota used by student.
Date Uploaded From	Specify a date from which you want to search uploaded attachments.
Date Uploaded To	Specify a date to which you want to search uploaded attachments.
Uploaded By (Last, First)	Enter the name of the user who uploaded the attachment in its entirety or in part. **Note:** If entering the name of the user in part, it must match the sub-string format of last, first. For example, "smith, b" will return search results. However, "smi, b" will not.

6. Click **Apply**. The following information displays for each attachment:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by Student and then Title.

   Note: Use the pagination at the top and bottom of the page to navigate the search results.

Field	Description
[Attachment]	Do one or more of the following: • Select the checkbox in the header row to select all attachments. • Deselect the checkbox in the header row to deselect all attachments. • Select the checkbox next to each attachment you want to work with.

	- Deselect the checkbox next to each attachment you do not want to work with. - Press **SHIFT** while selecting multiple checkboxes, which automatically selects all checkboxes between your first and last selection. **Note:** Your checkbox selections are retained as you navigate through the different pages of the search results.
Student Name	The name of the student.
File Name	The file name of the attachment.
Title	The title of the attachment.
Categories	The categories applied to the attachment.
File Size	The file size of the attachment.
Date	The date and time the attachment was uploaded.
Uploaded By	The name of the user or plugin who uploaded the attachment.
Actions	Do one of the following: - Click the **Information** icon to view attachment details. For more information, see *How to View Attachment Details*. - Click the **Information** icon to edit attachment details. For more information, see *How to Edit Attachment Details*. - Click the **Download** icon to download the attachment. For more information, see *How to Download an Attachment*.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten attachments display per page. To view more attachments per page, choose the appropriate number from the pop-up menu.

	Note: Viewing a large number of rows per page can cause browser slowness or scripting errors.

How to Download Multiple Document Attachments

Note: A zip file is created when downloading multiple document attachments. Within the zip file, a folder is created based on each selected student number. Within each student number folder, document attachments are listed by file name. If name of the attachment is more than 250 characters, it will be truncated. If there are duplicate attachments, the duplicate will be suffixed with a sequential number, such as _1, _2, etc.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Search Attachments**. The Search Attachments page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by Student Name, File Name, then Date.

5. Do one of the following:
   - Select the checkbox in the header row to select all attachments.
   - Deselect the checkbox in the header row to deselect all attachments.
   - Select the checkbox next to an attachment you want to download.
   - Deselect the checkbox next to an attachment you do not want to download.
   - Press **SHIFT** while selecting multiple checkboxes, which automatically selects all checkboxes between your first and last selection.
6. Click **Download Selection**. The Confirm Download popup appears.

Note: If you do not have download permission for one or more selected files, an alert appears indicating the file(s) you selected cannot be downloaded. If you proceed, only those files for which you have permission will be downloaded.

7. By default, the file name appears as **PowerSchool-Documents.zip**. Edit if needed.
8. Click **Download**.
9. Save the file to your desktop (varies depending on your browser).

How to Delete Multiple Document Attachments

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Search, choose **Search Attachments**. The Search Attachments page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. To narrow the list attachments, enter information in the Filter section. For detailed information, see *How to Filter Attachments*. The total number of attachments, total size of the attachments and an itemized list of attachments display based on the information you entered.

   Note: With the exception of Categories, click the name of a column to sort by that column in ascending order. Click again to sort in descending order. By default, attachments are sorted by Student Name, File Name, then Date.

5. Do one of the following:
   - Select the checkbox in the header row to select all attachments.
   - Select the checkbox next to each attachment you want to work with.
6. Click **Delete**. The Confirm Delete pop-up appears.

   Note: If you do not have delete permission for one or more selected files, an alert appears indicating the file(s) you selected cannot be deleted. If you proceed, only those files for which you have delete permission will be downloaded.

7. Click **Confirm Delete**.

Note: The selected document attachments will be deleted regardless of whether you remain on the Search Attachments page, navigate to another page or close the browser.

Export Document Attachment Data

To export document attachment student quota data, run the Get Student Quota query using the Data Export Manager.

How to Export Document Attachment Data

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Choose **Additional Data Sets** or **Show All** from Category pop-up menu.
5. Choose **Document Attachment: Get Student Quota** from the **Export From** pop-up menu.
6. To continue, see *How to Export Data Using the Data Export Manager*.

Troubleshooting

Rebuild Metadata

There are instances where PowerSchool and the document storage server can be out of sync, such as when reverting to a backup. When this occurs, you can use the Rebuild Metadata special operation to rebuild metadata in the database from the source system.

Database Import Process and Document Attachments

During the database import process, Document Attachments settings are cleared from the database. Configuring the document server is required to reconnect your server to your existing document attachment data that may have been previously configured on another system. For more information, see the *Configure Document Server* section of the *Oracle Database Backup and Restore Guide* available on PowerSource.

How to Rebuild Metadata (Single Server)

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. Choose **Rebuild Metadata From Document Server** from the **Operations** pop-up menu.
4. Click **Submit**. The Rebuild Metadata From Document Server page displays the following information:

Field	Description
Current Status	The status of the rebuild process.
Progress	Indicates the progress of the rebuild process.
Start Time	The time the rebuild process began.
Elapsed Time	The time it took for the rebuild process to complete.
Imported Metadata	The number of imported metadata.
Unrecoverable Documents	The number of orphaned documents. **Note:** Unrecovered documents are those that are missing their document metadata. Document metadata contains system and file details such as title, notes, etc. Those documents cannot be recovered during the rebuild process and require you to manually reattach them to the student. These documents will be stored in folder names based on their DCID within the document storage root in the following subdirectory: recover/districtid recovery directory. The file names are stored with the name as a unique identifier and extension '.recover'.

5. Click **Rebuild**.
6. Click **Confirm Rebuild**.

   Note: If necessary, you can click **Stop Rebuild**. However, stopping a rebuild can cause PowerSchool and the document storage server to remain out of sync. It is recommended that the process be allowed to finish running.

How to Rebuild Metadata (Server Array)

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. Choose **Rebuild Metadata From Document Server** from the **Operations** pop-up menu.
4. Click **Submit**. The Rebuild Metadata From Document Server page displays the following information:

Field	**Description**
Current Status	The status of the rebuild process.
Progress	Indicates the progress of the rebuild process.
Start Time	The time the rebuild process began.
Elapsed Time	The time it took for the rebuild process to complete.
Imported Metadata	The number of imported metadata.
Unrecovered Documents	The number of orphaned documents. **Note:** Unrecovered documents are those that are missing their document metadata. Document metadata contains system and file details such as title, notes, etc. Those documents cannot be recovered during the rebuild process and require you to manually reattach them to the student. These documents will be stored in folder names based on their DCID within the document storage root in the following subdirectory: recover/districtid recovery directory. The file names are stored with the name as a unique identifier and extension '.recover'.

5. Use the following table to enter information fields:

Field	**Description**

Hostname/IP	Enter the hostname or IP address of the document share location. **Note:** This field is required.
Share Name	Enter the share name of your document storage location. **Note:** This field is required.
Path	Enter the path to the document root within the server array. The document root defaults to 'PS3' in standard configurations but may be different if changed manually.
Username	Enter a username. **Note:** This field is required.
Password	Enter the corresponding password for the username. **Note:** This field is required.

6. Click **Rebuild**.
7. Click **Confirm Rebuild**.

   Note: If necessary, you can click **Stop Rebuild**. However, stopping a rebuild can cause PowerSchool and the document storage server to remain out of sync. It is recommended that the process be allowed to finish running.

Summer School

Note: For more information, see the *PowerSchool Summer School Setup Guide* available on PowerSource.

Set Summer School Indicator for a Student

If a student plans on attending summer school, use the **Summer School Indicator** field to identify which school the student will attend.

How to Set Summer School Indicator for a Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Scheduling Setup** from the student pages menu. The Edit Scheduling Preferences page appears.
3. Choose the summer school that the student plans to attend from the **Summer School Indicator** pop-up menu.

   Note: In order for the pop-up menu to be populated, at least one school has to be designated as a summer school. For more information, see *School Information*.

4. Click **Submit**. The Changes Recorded page appears.

Set Summer School Indicator for a Group of Students

If a group of students plan on attending summer school, use the **Summer School Indicator** group function to identify which school the students will attend.

How to Set Summer School Indicator for a Group of Students

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Scheduling, choose **Summer School Indicator**. The Summer School Indicator page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information in the fields:

Field	Description
Summer School Indicator	Choose the summer school that the group of students plan to attend from the pop-up menu. **Note:** In order for the pop-up menu to be populated, at least one school has to be designated as a summer school. For more information, see *School Information*.
Note for Summer School Admin	Enter any notes you would like to communicate to the Summer School Admin.

5. Click **Submit**. A confirmation message appears.

View Summer School Indicator

Using the Scheduling Setup page, you can view whether or not the Summer School Indicator has been set for a student.

How to View Summer School Indicator

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Scheduling, choose **Scheduling Setup** from the student pages menu. The Edit Scheduling Preferences page appears.
3. Note the **Summer School Indicator** field.

Student Contacts

PowerSchool provides districts with the ability to associate multiple contacts to students for both emergency and non-emergency situations. Contacts are their own entity in PowerSchool, with their own data that can be shared with multiple students to support interconnected relationships and modern family structures.

Working with Contact Pages

The Contact pages, provides a contact-centric view for managing contacts and their information.

Add Contacts

Using the **New Contact Entry** under People in the main menu, you can quickly and easily add new contacts.

How to Add a Contact

1. On the start page, choose **New Contact Entry** under People in the main menu. The Create Contact page appears.
2. Use the following table to enter information in the Demographics section:

Field	**Description**
Prefix	Choose the contact's name prefix from the pop-up menu.
First Name	Enter the contact's first name.
Middle Name	Enter the contact's middle name.
Last Name	Enter the contact's last name.
Suffix	Choose the contact's name suffix from the pop-up menu.
Gender	Choose the contact's gender from the pop-up menu.

Employer	Enter the contact's employer.
Exclude This Contact from State Reporting	Select the checkbox to exclude this contact from state reporting. **Note:** The checkbox only appears if enabled by PowerSchool Compliance.
Active	A contact is active by default. Deselect the checkbox if the contact is inactive. Inactive contacts do not show in search results by default.

3. Enter information in the Web Account Access section, as needed.
4. Enter information in the Students section, as needed.
5. Enter information in the Phone Numbers section, as needed.
6. Enter information in the Email Addresses section, as needed.
7. Enter information in the Addresses section, as needed.
8. Click **Submit**. A confirmation message appears and the contact is assigned a Contact ID, which will appear at the bottom of the Contact Details page.

Search for Contacts

Using the **Contacts** tab on the start page or the **Contact Search** link under People in the main menu, you can quickly and easily search for existing contacts. You can enter search criteria or you can click a letter of the alphabet to display a list of contacts whose last names begin with the selected letter. For example, if you click **B**, the system displays the contacts at your school whose last names begin with a "B".

How to Search for Contacts

1. On the start page, do one of the following:
   - Click the **Contacts** tab.
   - Choose **Contact Search** under People in the main menu.
2. Use the following table to enter search criteria in the fields:

Field	Description
First Name	Enter search criteria in the search field.

Last Name	Enter search criteria in the search field.
Street Address	Enter search criteria in the search field.
Unit	Enter search criteria in the search field.
Phone Number	Enter search criteria in the search field.
Extension	Enter search criteria in the search field.
Email Address	Enter search criteria in the search field.
Include Inactive	By default, only active contacts are included in the search results. Select the checkbox for all contacts.
Only Show Access Accounts	By default, only contacts who have an access account are included in the search results. Deselect the checkbox for all contacts.

3. Click **Search**. Search results appear.

   Note: You can also press **RETURN** (Mac) or **ENTER** (Win) to initiate the search.

4. Use the following table to view search results:

Field	**Description**
Contact	The contact's last, first name. Click to view the Contact Details page. **Note:** If a name was not entered for a contact, then "No Name:[ContactID]" appears.
Street Address	The street portion of the contact's address.
Phone Number	The contact's phone number and extension.

Email Address	A comma-delimited list of the contact's email addresses.
Access Account	A green checkmark indicates that the contact has web account access. **Note:** To create a web access account, see *Web Account Access*.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

Edit Contacts

Use this procedure to edit information associated to a contact.

Note: If the contact has web account access, an email notification is sent to the contact's account email address if the contact's first name, last name, username, password or account email address is changed.

Note: The **Username** field appears as read-only if Unified Classroom is enabled. For more information, see *Unified Classroom Setup*.

How to Edit a Contact

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Enter or edit information in the Demographics section.
3. Enter or edit information in the Web Account Access section, as needed.
4. Enter or edit information in the Students section, as needed.
5. Enter or edit information in the Phone Numbers section, as needed.
6. Enter or edit information in the Email Addresses section, as needed.
7. Enter or edit information in the Addresses section, as needed.
8. Click **Submit**. A confirmation message appears.

Delete Contacts

Use this procedure to delete a contact.

Note: Deleting a contact will permanently delete the contact, along with all of their associated historical and current data, and their web access account (if present). In most cases it is preferable to disable a contact record.

How to Delete a Contact

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Click **Delete**.
3. Click **Confirm Delete**.
4. Click **OK**. A confirmation message appears.

Web Account Access

In order for a contact to access their student's data on the PowerSchool Student and Parent portal, web account access will need to be provided. A contact's web account access may be added when creating a new contact or when editing an existing one.

Note: An account email address that is not assigned to another user’s access account is required when setting up an access account.

How to View Web Account Access

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Web Account Access** section.
3. Use the following table to view information in the fields:

Field	Description
Account Enabled	A green checkmark indicates the contact has web account access.
Username	The contact's username to be used by the contact to sign in to the PowerSchool Student and Parent portal.
Account Email	The contact's email address to use for access account recovery .

How to Add Web Account Access

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Web Account Access** section.
3. Click **Add Account**. The Add Web Account Access drawer opens.
4. Use the following table to enter information in the fields:

Field	Description
Account Enabled	See *How to Lock/Unlock Web Account Access*.
Username	Enter the user name to be used by the contact to sign in to the PowerSchool Student and Parent portal. The user name must be unique. If you enter a user name that is already in use, you will be prompted to enter another user name. Username suggestions will be included in the prompt.
New Password	Enter the password to be used by the contact to sign in to the PowerSchool Student and Parent portal. **Note:** Once submitted, field appears blank.
Confirm Password	Enter the password again exactly as you entered it in the above field. **Note:** Once submitted, field appears blank.
Account Email	Enter the contact's email address to use for access account recovery or use the pop-up menu to select an email address from Email Address section. **Note:** The pop-up only appears if email addresses have been added to the Email Addresses section.

4. Click **Ok**. The Add Web Account Access drawer closes.
5. Click **Submit**. A confirmation message appears.

How to Edit Web Account Access

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Web Account Access** section.
3. Click **Edit Account**. The Edit Web Account Access drawer opens.
4. Edit information as needed. For field descriptions, see *How to Add Web Account Access*.
5. Click **Submit**. The Edit Web Account Access drawer closes. A confirmation message appears.

Lock/Unlock Web Account Access

Use the following procedures to lock or unlock a contact's web account access. When a contact's web account access is locked, the contact cannot sign in to the PowerSchool Student and Parent portal using that account. When a contact web account access is unlocked, the contact can once again sign in to the PowerSchool Student and Parent portal using that account.

Note: If a contact is set to inactive, the contact's web account access will automatically be locked/disabled. If a contact is set to active, the locked/disabled setting will not be affected.

How to Lock/Unlock Contact Account

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the Web Account Access section.
3. Click **Edit Account**. The Edit Web Account Access drawer opens.
4. Do one of the following:
    - Select the **Account Enabled** checkbox to unlock the contact account.
    - Deselect the **Account Enabled** checkbox to lock the contact account.
5. Click **Submit**. The Edit Web Account Access drawer closes. A confirmation message appears.

Reset Contact Passwords

Use the following procedure to manually reset an individual parent's PowerSchool Student and Parent portal password. Depending on your district password rule settings, once you issue the temporary password, the parent may be required to change their password upon signing in.

How to Reset Contact Password

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the Web Account Access section.
3. Click **Edit Account**. The Edit Web Account Access drawer opens.
4. In the **Password** field, enter the password to be used by the contact to sign in to the PowerSchool Student and Parent portal.
5. In the **Confirm Password** field, enter the password again exactly as you entered it in the above field.
6. Click **Submit**. The Edit Web Account Access drawer closes. A confirmation message appears.

Students

Managing students associated to a contact may be done when creating a contact or anytime thereafter.

How to View Students Associated to a Contact

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Students** section.
3. Click the arrow to expand the section. Click the arrow again to condense the section.
4. Click column headings to sort in ascending order. Click again to sort in descending order.

   Use the following table to enter information in the fields:

Field	Description
Show All	By default the checkbox is not selected and only current student associations appear. If there are any past and future student associations, the number of past and future student associations appears in parenthesis next to **Show All**. Select the checkbox to also include past and future student associations. Past and future student associations will appear in italics.
Add Students	For detailed information, see *How to Add a Student Association*.
School	The student's school abbreviation.
Name	The student's name. Click to view the student's information.
Relationship	The student's relationship to the contact.
Custody	Indicates if the contact has custody over the student.
Lives With	Indicates if the student lives with the contact.

School Pickup	Indicates if the student can be picked up by the contact.
Emergency Contact	Indicates if the contact is an emergency contact for the student.
Original Contact Type	The original contact this record is tied to in the original student pages. Only records with an Original Contact Type are mapped back to the original system. The Original Contact Type can be one of the following: Mother, Father, Guardian, Emergency Contact 1-3.
Start Date	The date from which the student association is valid. **Note:** Student associations with end dates in the past or start dates in the future will not display unless the option to **Show All** is selected.
End Date	The date at which the student association is no longer valid. **Note:** Student associations with end dates in the past or start dates in the future will not display unless the option to **Show All** is selected.
Data Access	Indicates if the contact has access to the student's data through the PowerSchool Parent portal and/or email notifications.
Action	The following actions that may be performed: • Click the **Pencil** icon to edit relationship details. For more information, see *How to Edit a Relationship Details*. • Click the **Minus** icon to remove a student association. For more information, see *How to Remove a Student Association*.

How to Add a Student Association

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Students** section.

Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click **Add Students**. The Add Students drawer appears.
4. Use the following table to search for students:

Field	Description
[Search Students]	Enter search criteria in the search field.
[Search Icon]	Click to initiate the search.
View Field List	Click to view the PowerSchool Field List pop-up, which displays a list of all fields that can be used to perform a student search. For more information, *How to Search for Students by Other Fields*.
[Alphabet]	Click a letter of the alphabet to display a list of students whose last names begin with the selected letter. For example, if you click **B**, the system displays the students at your school whose last names begin with a "B".

5. Use the following table to search for students:

Field	Description
[All Students]	Select the checkbox in the header row to select all students.
[Student]	Select the checkbox next to each student you want to associate to the contact.
School	The student's school.
Student	The student's name.
Student Number	The student's identification number.

	Note: This field only appears if configured in PowerSchool.
Date of Birth	The student's date of birth. **Note:** This field only appears if configured in PowerSchool.
Relationship to Student	Use the pop-up menu to indicate the contact's relationship to the student.
Data Access	Select the checkbox in order for this contact to access the student's data on the PowerSchool Student and Parent portal. The contact must have an access account for this option to be available.

6. Click **Ok**. The Add Students drawer closes.
7. Click **Submit**. A confirmation message appears.

How to Edit Relationship Details

Note: This procedure may also be performed via the student Contact page. For more information, see *Working with Student Contacts*.

1. Do one of the following:
    - Add a contact.
    - Edit a contact.
2. On the Contact Details page, scroll to the **Students** section.

    Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Pencil** icon of the student you want to edit. The Details drawer appears. By default the Active tab displays the active contact-relationship record.
4. Use the following table to edit information in the Active tab fields:

Field	Description
Relationship	Use the pop-up menu to indicate the contact's relationship to the student.

Start Date	If applicable, enter the date from which the record is valid or click the **Calendar** icon to select a date **Note:** Records with start dates in the past or future will not display unless the option to **Show All** is selected.
End Date	If applicable, enter the date at which the record is no longer valid or click the **Calendar** icon to select a date. **Note:** Records with start dates in the past or future will not display unless the option to **Show All** is selected.
Has Custody	Select the checkbox to indicate that the contact has custody over the student.
Lives With	Select the checkbox to indicate that the student lives with the contact.
School Pickup	Select the checkbox to indicate that the student can be picked up by the contact.
Emergency Contact	Select the checkbox to indicate that the contact is an emergency contact for the student.
Receives Mail	Select the checkbox to indicate that the contact should receive regular mail for the student.
Exclude These Details from State Reporting	Select the checkbox to indicate that the student-contact relationship information is to be excluded from state reporting. **Note:** The checkbox only appears if enabled by PowerSchool Compliance.
Notes	Any notes regarding the student-contact relationship.
Original Contact Type	Use the pop-up menu to indicate the original contact associated to this record in the legacy system. Only records with an original contact type are mapped back to the original system.

	Note: A student may only have one of each original contact type. **Note:** To re-assign an original contact type to another contact; remove the original contact type from the first contact. The original contact type may then be re-assigned to another contact.

5. Click the **All** tab to view all past, current and future contact-relationship records between the selected student and this contact.
6. Use the following table to edit information in the All tab fields:

Field	Description
Add Detail	1. Click to add a new contact-student relationship record. The Add Detail pop-up appears. 2. Enter information as needed. For field descriptions, see the Active tab. 3. Select the **Automatically Adjust Overlapping Dates** checkbox if you want the date range you entered to be automatically adjusted if the date range overlaps with another contact-student relationship detail record. **Note:** The date range you entered will be adjusted as long as the date range is not completely contained within the date range of another contact-student relationship record. 4. Click **Ok**. **Note:** Only one contact-relationship detail record between the selected student and contact can be active on any given date.
[Date Range]	Past, current and future contact-student relationship date ranges appear in chronological order. To edit: 1. Click the arrow to expand the section and view information. For field descriptions, see the Active tab. Alternately, click the arrow again to condense the section. To edit:

	2. Edit information as need. For field descriptions, see the [Active tab](#). 3. Click **Ok**. To delete: 1. Click **Delete**. 2. Click **Confirm Delete**. **Note:** If only one contact-student relationship record exists, the **Delete** button appears shaded.

7. If the contact has Web Access, use the following table to edit information in the Data Access tab fields:

Field	Description
Can Access Student Data and Email	Select the checkbox if you want the contact to be able to access data in the PowerSchool Parent portal and to receive emails for this student. This option is only available if the contact has an access account.
What information would you like to receive?	Specify which information you would like send to the parent by selecting the appropriate checkboxes: • **Summary of Current Grades and Attendance** • **Detail Report Showing Assignment Scores for Each Class** • **Detail Report of Attendance** • **School Announcements** • **Balance Alert** **Note:** Users are also able to modify the information they want to receive in the PowerSchool Student and Parent portal.
Frequency of Emails	Specify the rate at which you want to send the parent the selected information from the pop-up menu: • **Never**

	• **Weekly** • **Every Two Weeks** • **Monthly** • **Daily**
Send Now	Select the checkbox to send an email immediately after submitting the page.
Restrict Parent Access	If a plugin is enabled that restricts parent access, additional checkboxes appear. Select applicable checkboxes.

8. Click **Submit**. The Details drawer closes. A confirmation message appears.

How to Remove a Student Association

Note: If a student association is removed, web access for that student will also be removed.

Note: If a student association is removed for a contact with an Original Contact Type, the contact will also be removed from the legacy student pages and fields.

1. Do one of the following:
    - Add a contact.
    - Edit a contact.
2. On the Contact Details page, scroll to the **Students** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Minus** icon of the student association you want to remove. The Delete Student Contact Relationship pop-up appears.
4. Click **Delete**. A confirmation message appears.

Phone Numbers

A contact's phone numbers may be added when creating a new contact or when editing an existing one.

Notes: Field level security may be used to restrict phone information (PHONENUMBER.PHONENUMBERASENTERED, PHONENUMBER.PHONENUMBER and PHONENUMBER.PHONENUMBEREXT). For more information, see *Field Level Security*.

How to View Phone Numbers

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Phone Numbers** section.
3. Click the arrow to expand the section. Click the arrow again to condense the section.

   The following information appears:

Field	Description
Add Phone	For detailed information, see *How to Add a Phone Number*.
Order	Use the up and down arrows to indicate the order in which you want the phone numbers to appear. This order is used to determine which phone number should first display on original student pages, reports, and anywhere else phone numbers are referenced. **Note:** Arrows appear shaded when not applicable.
Type	The phone number type. **Note:** When working with Original Contacts, the type will determine which phone number will show on the original student pages. The first phone number of a given type will be the one to display in the respective field.
Phone Number	The contact's phone number and extension. **Note:** The extension is automatically prefixed by an "x".
Preferred	Indicates if the phone number is a preferred phone number by which the contact would like to be contacted.
SMS	Indicates if the contact's phone number accepts text messages.

Action	The following actions that may be performed: • Click the **Pencil** icon to edit a phone number. For more information, see *How to Edit a Phone Number*. • Click the **Minus** icon to delete a phone number. For more information, see *How to Delete a Phone Number*.

How to Add a Phone Number

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Phone Numbers** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click **Add Phone**. The Add Number drawer appears.
4. Use the following table to enter information in the fields:

Field	Description
Type	Choose the appropriate phone number type from the pop-up menu. **Note:** When working with Original Contacts, the type will determine which phone number will show on the original student pages. The first phone number of a given type will be the one to display in the respective field.
Phone Number	Enter the contact's phone number.
Extension	Enter the contact's phone number extension. **Note:** The extension must be entered as numerical value.
SMS	Select the checkbox to indicate that the contact's phone number accepts text messages.

Preferred	Select the checkbox to indicate that this phone number is a preferred phone number by which the contact would like be contacted.

5. Click **Ok**. The Add Phone Number drawer closes.
6. Click **Submit**. A confirmation message appears.

How to Edit a Phone Number

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Phone Numbers** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Pencil** icon of the phone number you want to edit. The Edit Phone Number drawer appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Phone Number*.
5. Click **Submit**. The Edit Phone Number drawer closes. A confirmation message appears.

How to Delete a Phone Number

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Phone Numbers** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Minus** icon of the phone number you want to delete. The Delete Phone pop-up appears.
4. Click **Delete**. A confirmation message appears.

Email Addresses

A contact's email addresses may be added when creating a new contact or when editing an existing one. Contacts can also manage their own email addresses in the PowerSchool Student and Parent portal.

How to View Email Addresses

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Email Addresses** section.
3. Click the arrow to expand the section. Click the arrow again to condense the section.

   The following information appears:

Field	Description
Add Email	For detailed information, see *How to Add an Email Address*.
Primary	Checkmark to indicate that this email address is the preferred email address by which the contact would like be contacted.
Type	The contact's email address type.
Email Address	The contact's email address.
Action	The following actions that may be performed: • Click the **Pencil** icon to edit an email address. For more information, see *How to Edit an Email Address*. • Click the **Minus** icon to delete an email address. For more information, see *How to Delete an Email Address*.

How to Add an Email Address

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Email Addresses** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click **Add Email**. The Add Email Address drawer appears.
4. Use the following table to enter information in the fields:

Field	Description
Type	Choose the appropriate email address type from the pop-up menu.
Email	Enter the contact's email address.
Primary	Select the checkbox to indicate that this email address is the preferred email address by which the contact would like be contacted.

5. Click **Ok**. The Add Email Address drawer closes.
6. Click **Submit**. A confirmation message appears.

How to Edit an Email Address

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Email Addresses** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Pencil** icon of the email address you want to edit. The Edit Email Address drawer appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Email Address*.
5. Click **Submit**. The Edit Email Address drawer closes. A confirmation message appears.

How to Delete an Email Address

Note: The Primary email cannot be deleted. To delete the Primary email, remove the Primary status from the email and assign Primary status to another email. For more information, see *How to Edit an Email Address*.

1. Do one of the following:
    - Add a contact.
    - Edit a contact.
2. On the Contact Details page, scroll to the **Email Addresses** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Minus** icon of the email address you want to delete. The Delete Email pop-up appears.
4. Click **Delete**. A confirmation message appears.

Addresses

A contact's addresses may be added when creating a new contact or when editing an existing one.

How to View Addresses

1. On the start page, search for and select a contact. The Contact Details page appears.
2. Scroll to the **Addresses** section. The following table to enter information in the fields:

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

Field	Description
Show All	By default the checkbox is not selected and only current addresses appear. If there are any past and future student addresses, the number of past and future student addresses appears in parenthesis next to **Show All**. Select the checkbox to also include past and future student addresses. Past and future addresses will appear in italics.
Add Address	For detailed information, see *How to Add an Address*.
Order	Use the up and down arrows to indicate the order in which you want the phone numbers to appear.

	Note: Arrows appear shaded when not applicable.
Type	The address type.
Address Line 1 Address Line 2	The first and second lines of the contact's address.
Unit	The apartment number of the contact's address.
City	The city of the contact's address.
State/Province	The state or province of the contact's address.
Postal Code	The zip code of the contact's address.
Country	The country of the contact's address.
Start Date	The date from which the address is valid. **Note:** Addresses with start dates in the future or end dates in the past will not display unless the option to **Show All** is selected.
End Date	The date at which the address is no longer valid. **Note:** Addresses with start dates in the future or end dates in the past will not display unless the option to **Show All** is selected.
Action	The following actions that may be performed: • Click the **Pencil** icon to edit an address. For more information, see *How to Edit an Address*. • Click the **Minus** icon to delete an address. For more information, see *How to Delete an Address*.

How to Add an Address

1. Do one of the following:

- Add a contact.
- Edit a contact.

2. On the Contact Details page, scroll to the **Addresses** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click **Add Address**. The Add Address drawer appears.
4. Use the following table to enter information in the fields:

Field	Description
Type	Choose the appropriate address type from the pop-up menu.
Address Line 1	Enter the first line of the contact's address.
Address Line 2	Enter the second line of the contact's address, if applicable.
Unit	Enter the apartment number of the contact's address, if applicable.
City	Enter the city of the contact's address.
Country	Use the pop-up menu to select the country of the contact's address.
State/Province	Use the pop-up menu to select the state or province of the contact's address.
Postal Code	Enter the postal code of the contact's address.
Start Date	If applicable, enter the date from which the address is valid or click the **Calendar** icon to select a date **Note:** Addresses with start dates in the future or end dates in the past will not display unless the option to **Show All** is selected.

End Date	If applicable, enter the date at which the address is no longer valid or click the **Calendar** icon to select a date. **Note:** Addresses with end dates in the past or start dates in the future will not display unless the option to **Show All** is selected.

5. Click **Ok**. The Add Address drawer closes.
6. Click **Submit**. A confirmation message appears.

How to Edit an Address

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Addresses** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Pencil** icon of the address you want to edit. The Edit Address drawer appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Address*.
5. Click **Submit**. The Edit Address drawer closes. A confirmation message appears.

How to Delete an Address

1. Do one of the following:
   - Add a contact.
   - Edit a contact.
2. On the Contact Details page, scroll to the **Addresses** section.

   Note: Click the arrow to expand the section. Click the arrow again to condense the section.

3. Click the **Minus** icon of the address you want to delete. The Delete Address pop-up appears.
4. Click **Delete**. A confirmation message appears.

Working with Student Contact Pages

The student Contact pages, provides a student-centric view for managing students' contacts.

View Contacts Associated to a Student

Use this procedure to view contacts associated to a student.

How to View Contacts Associated to a Student

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Contacts** from the student pages menu. The Contacts page appears.
3. Use the following table to view information in the fields:

Field	Description
Show All	By default the checkbox is not selected and only current student contacts appear. If there are any past and future student contacts, the number of past and future student contacts appears in parenthesis next to **Show All**. Select the checkbox to also include past and future student contacts. Past and future student contacts will appear in italics.
Add	Click to add a new contact for the student. For detailed information, see *How to Add a Contact Association*.
Order	Use the up and down arrows to indicate the order in which you want the contacts to appear. **Note:** Arrows appear shaded when not applicable.
Name / Email	The contact's name or email. Click to view the Contact Details page for this contact.
Relationship	The contact's relationship to the student.
Phone Type	The contact's phone number type.

Phone	The contact's primary phone number and extension. **Note:** The extension is automatically prefixed by an "x".
Address	The contact's primary address.
Custody	Indicates if the contact has custody over the student.
Lives With	Indicates if the student lives with the contact.
School Pickup	Indicates if the student can be picked up by the contact.
Emergency Contact	Indicates if the contact is an emergency contact for the student.
Original Contact Type	The original contact this record is tied to in the legacy system. Only records with an Original Contact Type are mapped back to the original system.
Start Date	The date from which the student contact is valid. **Note:** Student contacts with end dates in the past or start dates in the future will not display unless the option to **Show All** is selected.
End Date	The date at which the student contact is no longer valid. **Note:** Student contacts with end dates in the past or start dates in the future will not display unless the option to **Show All** is selected.
Data Access	Indicates if the contact has access to the student's data through the PowerSchool Parent portal and/or email notifications.
Actions	The following actions that may be performed: • Click the **Pencil** icon to edit relationship details. For more information, see *How to Edit Relationship Details*.

	• Click the **Minus** icon to remove a contact association. For more information, see *How to Remove a Contact Association*.

Order Contacts

Use this procedure to view order contacts associated to a student.

How to Order Contacts

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Contacts** from the student pages menu. The Contacts page appears.
3. Use the up and down arrows in the Order column to indicate the order in which you want the contacts to appear.
4. Click **Submit**. A confirmation message appears.

Add Contact Associations

Use this procedure to associate new contacts to a student.

How to Add a Contact Association

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Contacts** from the student pages menu. The Contacts page appears.
3. Click **Add**. The Add Contacts drawer appears.
4. Search for and select a contact. A list of contacts appears.
5. Use the following table to add a contact:

Field	Description
[All Contacts]	Select the checkbox in the header row to select all contacts.
[Contact]	Select the checkbox next to each contact you want to associate to the student.

Contact	The contact's last, first name. Click to view the Contact Details page. **Note:** If a name was not entered for a contact, then "No Name:[ContactID]" appears.
Street Address	A comma-delimited list of the contact's street addresses.
Phone Number	A comma-delimited list of the contact's phone numbers.
Email Address	A comma-delimited list of the contact's email addresses.
Relationship	Use the pop-up menu to indicate the contact's relationship to the student.
Data Access	Select the checkbox in order for this contact to access the student's data on the PowerSchool Student and Parent portal. This option is only available if the contact already has a Web Access Account.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

6. Click **Ok**. The Add Contact drawer closes.
7. Click **Submit**. A confirmation message appears.

Edit Relationship Details

Use this procedure to edit the contact's relationship details to a student.

How to Edit Relationship Details

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Contacts** from the student pages menu. The Contacts page appears.

3. Click the **Pencil** icon of the contact's relationship you want to edit. The Details drawer appears.
4. To continue, see Step 4 of *How to Edit Relationship Details*.

Remove Contact Associations

Use this procedure to remove the association of the contact to the selected student.

How to Remove a Contact Association

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Contacts** from the student pages menu. The Contacts page appears.
3. Click the **Minus** icon of the contact you want to remove. The Delete Student Contact Relationship pop-up appears.
4. Click **Delete**. A confirmation message appears.

Import Contacts

Using the Data Import Manager, you can import new Contact records into PowerSchool. For detailed information, see *Data Import Manager* and *Importing Contacts*.

Note: This is only applicable to importing new contacts. Updating existing contacts will be made available in a future release.

Duplicate Contacts

Consolidate Duplicate Contacts

Duplicate contacts can be consolidated into a single contact record. Be warned that this function is irreversible. It should only be performed by users that understand how custom data is managed in your specific PowerSchool system. Data that can be merged is moved from the duplicate contacts onto a chosen master contact record. The master is the only record preserved after consolidation. The secondary contacts, and any additional web access accounts, are deleted from PowerSchool. A preview screen is presented before final consolidation but be sure any additional or custom data tied to these contacts has been consolidated outside of these pages prior to running this operation.

Important Notes About Consolidate All:

- All data that can be merged will be added to the master record, however whenever there will be data conflicts, the data on the master record “wins”. The consolidated contact will always retain the master Access Account, Relationship Type, and Original Contact Type value (if present). To prevent data loss you are encouraged to review each individual contact record and update the master records as necessary before final consolidation. It is not possible for PowerSchool to consolidate or even be aware of custom data.
- The access account of the master record is always preserved, when present. If the master record does not have an access account then the system will use the access account from another contact in the list, as long as there is only one to choose from. If there is more than one access account to choose from then the system will not be able to resolve which access account should be used. This situation can be avoided by selecting the master contact with the desired access account. You can also first consolidate the master record with the contact that has the desired access account in a separate transaction, after which you can consolidate the master with any other number of contacts.
- For any given student, the Original Contact Type value is retained on the master record, when present. Otherwise the value from one of the other contacts in the list is used. If there is more than one value for the same student then the system will leave it blank. In this case the correct value can be selected in the preview page before final consolidation.
- If you want to discard all data except for what is already part of the chosen master record, then use the consolidation option Keep Master Only.

How to Consolidate Duplicate Contacts

1. On the start page, do one of the following:
    - Click the **Contacts** tab.
    - Choose **Contact Search** under People in the main menu.
2. Search for possible duplicate contacts. A list of contacts appear.
3. Click **Select By Hand**. Checkboxes appear next to each contact.
4. Do one of the following:
    - Select the checkbox in the header row to select all contacts.
    - Select the checkbox next to each contact you want to consolidate.
5. Click **Consolidate Contacts**. The Consolidate Contacts page appears.
6. Note the **Master** column and verify the correct contact is selected as the master record for the consolidation. If the correct contact is not selected, select the option next to the contact that you want to become the master record for the consolidation. The master record is the only record that will remain after consolidation.

Note: If a contact is selected as the master, it may not be excluded from the merge.

7. Note the **Exclude** column. Select the checkbox next to any contact that you want to exclude from the merge.

   Note: If a contact is excluded from the merge, it may not be selected as the master.

8. Do one of the following:
   - Select the **Consolidate All Data** to consolidate all contact information into the master record. All core data that can be consolidated from the secondary contacts will be merged.
   - Select the **Keep Master Only** to discard all contact information expect the master record.
9. Click **Review**. The Consolidated Contact page appears.
10. Verify the information for the consolidated contact is correct. If not, edit the information as needed. At this stage, you may safely use the browser **Back** button to return to any prior step of the process. For field descriptions, see *Add Contacts*.

    Note: If there are any student detail conflicts encountered, an alert appears. To resolve, edit or remove the relationship detail records or adjust their dates. Overlapping dates are not permitted between relationship detail records, including when two records have no dates.

11. Click **Submit Consolidation**. The Confirm Consolidation pop-up appears.
12. Do one of the following:
    - Click **Ok** to proceed.

      Important Note: This action is not reversible

    - Click **Cancel** if you do not want to proceed.

Data Access Tags

Using the *Contact_Info data access tag (DAT) you can add certain contact information to Object Reports, Report Cards, Mailing Labels, and Form Letters by formatting various expressions. DATs can also be used on your own custom pages, and to export data through traditional export tools such as Quick Export and AutoSend.

Before Getting Started

Some important items to note before getting started:

- The *Contact_Info DAT is always run from the student's perspective.
- The DAT start with a list of contacts for each student, ordered based on the priority order than can be seen on the Students Contact page.
- Each contact can have a number of, addresses, emails, or phone numbers that are sorted in ascending priority order for each category. These contact items have attributes such as "Type" than can be used to filter the list.
- The items in the remaining filtered list are assigned a temporary index for reference within the DAT. For example, when a contact has 2 phones with type "Home" and 2 phones with type "Work", if the DAT has filtered to only Home phones then then index 2 will reference the second "Home" phone even if it started out as the 3rd phone number in the unfiltered list.
- If an expression resolves to nothing, an empty string is returned. For example, a request to display the 3rd Home phone in a list of 2.
- If an expression is not allowed to return a field due to the user's Field Level Security role restrictions, a string of five asterisks is returned (*****).
- It is possible for historical and future relationship detail records to exist between a single contact and student. Only one relationship detail record can be 'Active' on any given day. The *Contat_Info DAT only considers the relationship detail record that is active on the day the DAT is used

Syntax

The following outlines the general forms for calling the *Contact_Info DAT in different areas of PowerSchool:

Specific date values are specified as date	mm/dd/yyyy
Form on WEB page	~(*contact_info[;...])
Form on Object Report	~(*contact_info[;...]) ^(*contact_info[;...])
Form in Quick Export	~(*contact_info[;...]) ^(*contact_info[;...])
From Student Fields	*contact_info[;...]

Default (No Arguments)

For the quickest results in calling the *Contact_Info DAT in PowerSchool, use ~(*contact_info). Doing so, returns the student's first contact's prefix, first name, middle name, last name, and suffix.

Grammar

- Arguments are separated by semicolon.
- Keywords are separated from their arguments by an equals sign.
- Specific date values are specified as date:mm/dd/yyyy.

Workflow Overview

Step 1: Determine Who	• Start with all contacts for a student • Filter by relationship flags • Filter by AsOf (person) • Filter by relationship code value • Sort the remaining contacts by priority order • Truncate list at the specified max persons value (if present) • Evaluate which person (index into the current list)

Step 2: Determine What	• Process the contact by category, extracting field values
	• Categories are processed in this order:
	    • Demographics (Dem)
	    • Relationship (Rel)
	    • Phone
	    • Email
	    • Address

Who to Include

Queries are from the context of the currently selected student. From there, the contact list is narrowed down using the following predicates:

Rel (Relationship)

What	Filter contacts by the relationship to the student.

Keyword	Rel
Default	All
Values	All, or a comma separated list of relationship type codes, such as Mother, Father **Note:** List order is not important - contacts are ordered by priority, not relationship type.
Example	~(*Contact_Info;Rel=All)

Flags (Relationship Flags)

What	Filter contacts by relationship flags set on a contact-student relationship record.
Keyword	Flags
Default	None **Note:** The default behavior is to show only active contacts.
Values	A comma separated list of: • Include-Inactive • Only-Inactive • Custodial • Non-Custodial • Emergency • Non-Emergency • Lives-With • Not-Lives-With • School-Pickup • Not-School-Pickup • Receives-Mail • Not-Receives-Mail • Dataaccess

	• Not-Dataaccess
Example	~(*contact_info;flags=include-inactive)

Asof-Pers (As Of Person)

Note: Contacts can have multiple historical or future relationship detail records, but only the Active Relationship Detail record is considered when evaluating for asof-pers.

What	Filter the list of contacts associated with the student to those valid on a particular date.
Keyword	Asof-Pers
Default	Current (today)
Values	A specific date, or a comma separated list of the following keywords: current, past, future, active, all **Note:** • Current â€“ Includes contacts active today. • Past - Includes yesterday's active contacts; cannot have a start or end date after today. • Future - Includes tomorrow's active contacts, cannot have a start or end date before today. • Active - Contact with contact details closest to today's date. There can only be one active contact. Active contacts should not be confused with activating a contact. **Note:** A date is specified in the form: date:mm/dd/yyyy.
Example	• ~(*contact_info;asof-pers=current) • ~(*contact_info;asof-pers=current,past,future) • ~(*contact_info;asof-pers=date:03/30/2017)

Max-Pers (Max Persons)

What	Limit the number of contacts in the report.
Keyword	Max-Pers
Default	1
Values	All, or a number indicating how many people to include
Example	~(*contact_info;max-pers=1)

Which-Pers (Which Person)

What	Extract a contact from the list of contacts associated with a student.
Keyword	Which-Pers
Default	All
Values	All, or a number indicating which index in the list
Example	~(*contact_info;which-person=all) **Note:** Which-pers is evaluated after max-pers and sorted by priority order

What Data to Include

Cat (Category)

Note: Categories are processed in the following order: dem, rel, phone, email, addr.

What	Determines which categories of contact data to include.
Keyword	Cat

Default	Demo
Values	All, or a comma separated list of rel, demo, phone, email, addr
Example	~(*contact_info;cat=all) **Note:** If an unrecognized category is passed we default to dem (demographics).

Which-Val (Which Value)

What	Select an item from the list of items in the category.
Keyword	Which-Val
Default	1
Values	All, or a number indicating which index in the list **Note:** This setting is applied across all included categories.
Example	~(*contact_info;which-val=1)

Type

What	Filter output to include only the specified types of data.
Keyword	Type
Default	All
Values	All, or any valid type code for the selected categories **Note:** This setting is applied across all included categories
Example	~(*contact_info;type=all)

Asof-Val (As Of Value)

What	Filter output to items valid at a particular time.
Keyword	Asof-Val
Default	Current
Values	Date, or comma separated list of past, current, future, all **Note:** This setting is only supported for addresses (specifically not email, or phone number). A date is specified in the form: date:mm/dd/yyyy.
Example	• ~(*contact_info;as-of=current) • ~(*contact_info;as-of=date:12/31/2017)

Val (Value)

What	What values from a category to report.
Keyword	Val Demographics values: • Active • Employer • Firstname • Gender • Lastfirst (lastName, firstName middleName) • Lastname • Middlename • Prefix • Stateid • Statenum • Suffix Relationship values: • Active

	- Custody - Dataaccess - Emergency - Enddate - Liveswith - Receivesmail - Relationship - Schoolpickup - Srexcluded - Startdate Address values: - City - Country - Enddate - Line2 - Startdate - Stateprovince - Street - Type - Unit - Postalcode Phone values: - Phone - Preferred - Sms - Type Email values: - Email - Primary - Type
Default	All

Values	All, or a comma separated list of object fields
Example	~(*contact_info;val=all)

Display/format Options

Delimiters

Delimiters are used to offset different pieces of data from one another. Of special interest are:

Comma (,)	A comma followed by a space. Use this as a delimiter for a report.
Barecomma (,)	A comma with no padding. Use this as a delimiter for an export.

Contact-Delim (Contact Delimiter)

What	Specifies the delimiter to use between multiple contacts.
Keyword	Contact-Delim
Default	DFL
Values	DLF (double line-feed), LF (line-feed), P (HTML paragraph: <p>), br (HTML break:), comma (,), semicolon (;), space ( ), pipe (|)
Example	~(*contact_info;contact-delim=dlf)

Item-Delim (Item Delimiter)

What	Specifies the delimiter to use between multiples of the same item, such as multiple phones, multiple addresses, etc.
Keyword	Item-Delim

Default	Comma
Values	DLF (double line-feed), LF (line-feed), P (HTML paragraph: <p>), br (HTML break:), comma (,), semicolon (;), space ( ), pipe (|) **Note:** Reports do not honor LF or DLF; use P or B instead.
Example	~(*contact_info;item-delim=comma)

Value-Delim (Value Delimiter)

What	Specifies the delimiter to use between multiple values specified by the value parameter.
Keyword	Value-Delim
Default	Space
Values	DLF (double line-feed), LF (line-feed), P (HTML paragraph: <p>), br (HTML break:), comma (,), semicolon (;), space ( ), pipe (|) **Note:** Reports do not honor LF or DLF; use P or B instead.
Example	~(*contact_info;value-delim=lf)

Cat-Delim (Category Delimiter)

What	Specifies the delimiter to use between multiple categories, such as demographics, email, etc.
Keyword	Cat-Delim
Default	LF
Values	DLF (double line-feed), LF (line-feed), P (HTML paragraph: <p>), br (HTML break:), comma (,), semicolon (;), space ( ), pipe (|)

	Note: Reports do not honor LF or DLF; use P or B instead.
Example	~(*contact_info;contact-delim=dlf)

Localization

Locale

What	Specifies the locale to use when decoding dates.
Keyword	Locale
Default	Us_EN
Values	Valid locale code, such as el_GR
Example	~(*contact_info;locale=us_EN) **Note:** Date strings used in the DAT arguments are always entered in MM/dd/YYYY format. Only the return value is localized.

Student and Parent Portal Administrator Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Introduction

PowerSchool's external interface gives parents and students access to real-time information including attendance, grades and detailed assignment descriptions, school bulletins, lunch menus, and even personal messages from the teacher.

With PowerSchool's powerful communication tools, everyone stays connected: Students stay on top of assignments, parents are able to participate more fully in their student's progress, and teachers can use their gradebook to make decisions on what information they want to share with parents and students.

Note: Each parent can sign in to the PowerSchool Student and Parent portal with one account and see any and all students for whom they have legal and parental rights to.

Quick Start

To get started immediately, perform the following tasks to set up and begin using the PowerSchool Student and Parent portal:

- *Set District Name*
- *Hide/Show Balance Icon*
- *Set Grades/Store Codes*
- *Set the Active Term*
- *Set Up Email*
- *Enable/Disable Parent Access*
- *Enable/Disable Students Account Access*
- *Assign IDs and Password*
- *Distribute IDs and Password*

Parent Accounts

- *Search Parent Accounts*, now see *Search for Contacts*.
- *Manage Parent Accounts*, now see *Working with Contact Pages*, where you can:
    - Add Contacts
    - Search Contacts
    - Edit Contacts
    - Delete Contacts
    - Manage Contacts' Web Account Access, including:
        - Lock/Unlock Web Account Access
        - Reset Contact Passwords
    - Manage Students Associated to Contacts

- Manage Contacts' Phone Numbers
- Manage Contacts' Email Addresses
- Manage Contacts' Addresses
- *Lock/Unlock Parent Accounts*, now see *Lock/Unlock Web Account Access*
- *Reset Parent Account Passwords*, now see *Reset Contact Passwords*
- *Manage Students Associated to Parent Accounts*, now see *Students*, where you can:
  - View Students Associated to a Contact
  - Add Student Associations
  - Edit Relationship Details
  - Remove Student Associations

For complete information, see *Student Contacts*.

Student Accounts

- *Manage Parents Associated to Student Accounts*, now see *Working with Student Contact Pages*, where you can:
  - Manage Contacts Associated to Students, including:
    - View Contacts Associated to a Student
    - Order Contacts
    - Add Contact Associations
    - Edit Contact Details
    - Remove Contact Associations
- *Manage Parent Account*, now see *Add Contacts*

For complete information, see *Student Contacts*.

Other

- *Disable Access To Public Portal*
- *Enable Access To Public Portal*
- *Set Disabled Access Title/Message*

Display Options

PowerSchool provides various display options for the PowerSchool Student and Parent portal that allow administrators to control the data viewed by students or their parents.

Set District Name

When viewing school bulletins or printing PowerSchool Student and Parent portal information, the name of the selected student's school district appears at the top of the page. If you wish to update the district name, an option is available to modify the text as it appears in the PowerSchool Student and Parent portal.

How to Set the District Name

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Miscellaneous**. The Miscellaneous page appears.
3. Enter the name of the school district in the **Name of district that parents see on sign in screen** field.
4. Click **Submit**. The Changes Recorded page appears.

Hide/Show Balance Icon

When signed in to the PowerSchool Student and Parent portal, students and their parents can use the Balance icon to access fee transaction and lunch balance information. For PowerSchool users who do not use PowerLunch or the Fees component, the option is available to remove the Balance icon from the PowerSchool Student and Parent portal.

How to Hide/Show the Balance Icon

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Miscellaneous**. The Miscellaneous page appears.
3. Select the **Do not show the lunch balance on parent/student pages** checkbox to disable the Balance icon in the PowerSchool Student and Parent portal. When selected, the PowerSchool Student and Parent portal navigation bar no longer displays the Balance icon.

   Note: Alternately, deselect the **Do not show the lunch balance on parent/student pages** checkbox to enable the Balance icon in the PowerSchool

Student and Parent portal navigation bar. When selected, the PowerSchool Student and Parent portal navigation bar displays the Balance icon.

4. Click **Submit**. The Changes Recorded page appears.

Set Grades/Store Codes

You can specify which grades or store codes you'd like to appear in the PowerSchool Student and Parent portal. In addition to specifying the grade or store code, you can also specify whether the grades shown are from the current grade records or stored grade records.

How to Set Grades/Store Codes

1. On the start page, choose **School** under Setup in the main menu.
2. Under General, click **Quick Lookup Preferences**. The Quick Lookup Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Store Code	Displays the store code for the final grades, citizenship codes, and any store codes used only for historical grades.
Enabled Parent/Student	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool Student and Parent portal and PowerSchool Mobile. Deselect the checkbox to disable the display of this data.
Source of Data	Indicate which final grade and citizenship codes you want to display by choosing one of the following from the pop-up menu: • **Gradebook (Current)**: to display the final grade and/or citizenship codes that currently exists in the teacher's PowerTeacher Gradebook. Final grades not used by teachers (historical only) do not have this option. • **Historical (Stored)**: to display the final grade and/or citizenship codes from the student's historical file or after the completion of a grading term. Store Codes that only

	exist as historical grades will always come from the historical file.

5. Select the **Count Multi-Period Meeting Attendance Once Per Day** checkbox to count only one attendance instance for a class that meets more than once per day. Deselect the checkbox to count attendance for each period.
6. Select the **Show Citizenship Grade** checkbox to display the citizenship grade on the Quick Lookup page. Deselect the checkbox to disable the display.
7. Click **Submit**. The Changes Recorded page appears.

Set the Active Term

The active term allows you to determine which term parent and student access is limited to.

How to the Active Term

1. On the start page, choose **School** under Setup in the main menu.
2. Under Grading, click **Current Grade Display**. The Current Grade Display page appears.
3. Enter a valid term abbreviation in the **Active Term** field.

   Note: Only yearlong classes and classes that occur within the specified term will be displayed. Valid values for this field are term abbreviations in the current school year's Years and Terms setup. For example, if you have only defined the Y1, S1, and S2 terms, you will not be able to specify Q1 as the Parent/Student Access Term.

Email

Set Up Email

Before parents can receive email in the PowerSchool Student and Parent portal, you must enable email on the PowerSchool server.

How to Set Up Email

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Email**. The Email Setup page appears. By default the Email Setup tab appears selected.
4. Use the following table to enter information in the fields:

Field	Description
Enable Email Notifications	In order for PowerSchool users to receive scheduled email notifications, choose **Yes** from the pop-up menu. Alternatively, if you do not want PowerSchool users to receive scheduled email notifications, choose **No** from the pop-up menu. **Note:** This setting only applies to scheduled email notifications and not to the **Send Now** feature available on the PowerSchool Student and Parent portal. Parents can receive information immediately whenever needed.
Enable Emailing Of Guardian Reports	In order for PowerSchool users to receive nightly automatically generated reports, choose **Yes** from the pop-up menu. Alternatively, if you do not want PowerSchool users to receive nightly automatically generated reports, choose **No** from the pop-up menu. **Note:** This setting is disabled if **Enable Email Notifications** is set to No.
POP/SMTP Server	Enter your PowerSchool mail server address. Although you can enter a domain name, an IP address is preferred.

E-mail Address Of PowerSchool Technical Administrator	Enter your system administrator's email address.
E-mail "From" Host For Mail Generated By PowerSchool	Enter the domain name that appears after all email addresses at your school. For example, if your email address is user@auhsd.ca.us, enter **auhsd.ca.us**. Do not enter an IP address in this field.
Reply-To E-mail For Electronic Progress Reports Sent To Parents	Enter the email address to which parents can automatically reply when they receive a progress report email. On your mail server, you must set up an account that matches this address. Ensure that the email address you enter exists on your district's email server.
Reply-to Email For Parent Account Management	Enter the email address to which parents can automatically reply when they receive an account created, an account updated, or a password recovery email notification. On your mail server, you must set up an account that matches this address. Ensure that the email address you enter exists on your district's email server.
Complete E-mail Address To Use As The "From" Address When Sending System-Generated E-mail To Administrators And Teachers	Enter the email address you want administrators and teachers to reply to when they receive system-generated email messages. The system also displays this address as the From address in an email message. For example, if a student changes classes in the middle of a semester, the system sends an email message to the teacher of the class in which the student is enrolling. Ensure that the email address you enter exists on your district's email server.

5. Set up the following account on your mail server: powerschool@<yourmailserver>. For example, if your email address is user@fhs.fuhsd.ca.us, then the account must be set up as **powerschool@fhs.fuhsd.ca.us**.
6. Click **Submit**. A confirmation message appears.

Access Accounts

Enable/Disable Parent Access Accounts

Use the following procedures to lock or unlock all parents from viewing a student's academic record. When enabled, all parents associated to a student can view the student's academic record in the PowerSchool Student and Parent portal. When disabled, all parents can no longer view the student's academic record in the PowerSchool Student and Parent portal.

Note: To lock or unlock an individual parent account, see *Lock/Unlock Web Account Access*.

How to Enable Parent Access Accounts

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. In the Access Keys section, select the **Enable Parent Access** checkbox.
4. Do one of the following:
    - Manually assign parent/guardian account keys information. For more information, see *How to Manually Assign an Access ID and Password for Linking to a Student Account*.
    - Auto assign parent/guardian account keys information. For more information, see *How to Automatically Assign a Student's Username and Password and an Access ID and Password for Linking to a Student Account*.
5. Click **Submit**. A confirmation message appears indicating the account is updated.

How to Disable Parent Access

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. In the Access Keys section, deselect the **Enable Parent Access** checkbox.
4. Click **Submit**. A confirmation message appears indicating the account is updated.

Enable/Disable Student Access Accounts

Use the following procedures to enable or disable an individual student's PowerSchool Student and Parent portal account. When enabled, a student can sign in to the

PowerSchool Student and Parent portal. When disabled, a student can no longer sign in to the PowerSchool Student and Parent portal.

How to Enable a Student's Access Account

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. In the Student Access Account section, select the **Enable Student Access** checkbox.
4. Do one of the following:
    - Manually assign student account information. For more information, see *How to Manually Assign a Student's Username and Password*.
    - Auto assign student access information. For more information, see *How to Automatically Assign a Student's Username and Password*.
5. Click **Submit**. A confirmation message appears indicating the account is updated.

How to Disable a Student's Access Account

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. In the Student Access Account section, deselect the **Enable Student Access** checkbox.
4. Click **Submit**. A confirmation message appears indicating the account is updated.

IDs and Passwords

Assign IDs and Passwords

PowerSchool Student and Parent portal Access IDs and passwords can be manually or automatically assigned individually or by group. It is important to note that in addition to a Student Username and Password, each student is assigned an Access ID and an Access Password. Unlike usernames and passwords, Access ID and Access Password are not accounts themselves, but are used to link a student to a parent account. Anyone with the Student's Access ID and Password can add that student to their account. Parent can use each student's Access ID and Access Password to link to their existing parent account, or when they first create their parent account.

Note: If LDAP is configured on your server, select the **Student LDAP Enabled** checkbox to enable or disable LDAP Authentication for an individual student. For more information, see *LDAP*.

Note: Field level security may be used to restrict this information. The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Student Username** (STUDENTS.STUDENT_WEB_ID) and **LDAP Enabled** (STUDENTS.LDAPENABLED). For more information, see *Field Level Security*.

How to Manually Assign an Access ID and Password for Linking to a Student Account

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. Use the following table to enter information in the Access Keys fields:

Field	Description
Access ID	Enter the Access ID that parent/guardians will use to link this student to their account.
Access Password	Enter the Access Password that parent/guardians will use to link this student to their account.

4. Click **Submit**. A confirmation message appears indicating the account is updated.

How to Manually Assign a Student's Username and Password

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. Use the following table to enter information in the Student Access Account fields:

Field	Description
Student Username	Enter the student’s user name. **Note:** This field appears as read-only if Unified Classroom is enabled. For more information, see *Unified Classroom Setup*.
Student Password	Enter the student’s password.

4. Click **Submit**. A confirmation message appears indicating the account is updated.

How to Automatically Assign a Student's Username and Password and an Access ID and Password for Linking to a Student Account

Note: The **Auto-assign IDs and Passwords for this Student** link only appears if you have field level security full access to all student fields on this page. For more information, see *Field Level Security*.

1. On the start page, search for and select a student. For more information, see *Student Search*.
2. Under Information, choose **Access Accounts** from the student pages menu. The Access Accounts page appears.
3. Select the **Enable Student Access** checkbox in the Student Access Account section to allow the student to sign in to the PowerSchool Student and Parent portal.
4. Select the **Enable Parent Access** checkbox in the Access Keys section to allow all parents/guardians associated to this student to view the student's academic record in the PowerSchool Student and Parent portal.
5. Click **Auto-assign IDs & Passwords for this Student** to assign the:
    - Student username and password.
    - Access ID and Access Password that parents/guardians will use to link this student to their account.
6. Click **Submit**. A confirmation message appears indicating the account is updated.

How to Automatically Assign IDs/Passwords

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **ID/Password Assignment**. The Assign Passwords & IDs page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Enter information in the fields, as needed. For field descriptions, see *How to Assign an ID/Password*.
5. Click **Submit**. The Changes Recorded page appears
6. Click **Back** to return to the Assign Passwords & IDs page.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

   To notify parents and guardians of the Access IDs and Access Passwords they will use to link students to their account, create a form letter that includes the data access tags ^(web_ID) and ^(web_Password). Parents can create their own web account and use the Access ID and Access password for each of their students to their students to their newly created account. For more information about form letters, see *Form Letters*. For additional information, see *Distribute IDs and Passwords*.

Distribute IDs and Passwords

Once you have assigned IDs and passwords to your students, you may need to create a report, print the IDs and passwords, and distribute them to your students and parents. The following table can be used to determine which fields to include in your report:

Field Label	Field Name	Report Syntax
Student User Name	Student_Web_ID	^(Student_Web_ID)
Student Password	Student_Web_Password	^(Student_Web_Password)

Access ID	Web_ID	^(Web_ID)
Access Password	Web_Password	^(Web_Password)

When using the above fields in an object report, enter the text from the Report Syntax column in a text object. When using the above fields in a form letter, enter the text from the Report Syntax column in the body of the form letter.

Note: Remember that the Web_ID and Web Password is not actually a Parent account. Parents will use the Access ID and Access Password to link their students to their own accounts, which they can create themselves in the Parent Portal. To reduce confusion around this concept, it is a good practice to make this distinction whenever creating reports for sending the Access ID and Access Passwords to parents.

System Administrator User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Attendance

Attendance Code Categories

Attendance code categories are used to group attendance codes by classification, beyond Present or Absent, for reporting and searching purposes. Use the Attendance Code Categories page to view, add, delete, or edit the attendance code categories used at your school.

Note that attendance code categories are the one exception to year-specific data. Attendance code categories are a constant and should not be deleted from any year that uses them.

Tardy and Excused attendance code categories are set up by default and should not be deleted. In order for an attendance code to count as tardy, the attendance code must be associated to the attendance code category of Tardy. In order for an attendance code to count as excused, the attendance code must be associated to the attendance code category of Excused. Similarly, if you create other attendance code categories, in order for an attendance code to count as the attendance code category, the attendance code must be associated to that attendance code category.

Note: Attendance code categories are not used to group attendance codes by Present or Absent. All attendance codes are categorized as Present or Absent when creating the attendance code via the Attendance Code page. For more information, see *Attendance Codes*.

After creating attendance code categories, proceed to creating attendance codes. Attendance must be set up completely before taking attendance in PowerSchool.

For more information about attendance, see *Attendance Overview*.

How to Access the Attendance Code Categories Page

You can create as many categories as needed. Tardy and Excused are available by default.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page displays the following information:

Field	Description

Code	The code representing the attendance code category. This value is used in various data access tags, such as **^(per.att)**.
Name	The name of the attendance code category. **Note:** This field is currently not used anywhere else in PowerSchool.
Description	A description of the attendance code category.
Sort	The sort order of the attendance code category as it appears in the Code Categories list of checkboxes on the New/Edit Attendance Code pages.

How to Add an Attendance Code Category

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Click **New**. The New Attendance Code Category page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the attendance code category. This value is used in various data access tags, such as **^(per.att)**.
Name	Enter a name of the attendance code category. **Note:** This field is currently not used anywhere else in PowerSchool.
Description	Enter a description of the attendance code category.

Sort order for display	Use the pop-up menu to indicate the sort order of the attendance code category as it appears in the Code Categories list of checkboxes on the New/Edit Attendance Code pages.

5. Click **Submit**. The Attendance Code Categories page displays the new attendance code.

How to Edit an Attendance Code Category

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Click the code of the attendance code category you want to edit. The Edit Attendance Code Category page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Attendance Code Category*.
5. Click **Submit**. The Attendance Code Categories page displays the edited attendance code.

How to Delete an Attendance Code Category

When deleting an attendance code category, other users and student records may be directly impacted. Deleting an attendance code category is not recommended unless the attendance code category was created in error. If the attendance code category is already in use, it cannot be deleted.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Click the code of the attendance code category you want to delete. The Edit Attendance Code Category page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Sort Attendance Code Categories

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under Attendance, click **Attendance Code Categories**. The Attendance Code Categories page appears.
3. Choose different sort orders for the attendance code category from the **Sort** pop-up menus.
4. Click **Submit**. The page re-sorts the attendance code categories.

Attendance Codes

Attendance codes are used to define values, points, and calculations for school-specific attendance codes. Use this page to view, add, delete, or edit an attendance code used at your school. You must set up attendance codes before taking attendance in PowerSchool.

Note: Before you can set up attendance codes, you must set up attendance code categories. For more information, see *Attendance Code Categories*.

For more information about attendance, see *Attendance Overview*.

How to Access the Attendance Code Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page displays the following information:

Field	Description
Code	The attendance code appears.
Description	A description of the attendance code appears.
Teachers Assign	Indicates whether teachers can assign this attendance code in PowerTeacher.
Counts ADA	Indicates whether the attendance code counts towards average daily attendance (ADA).
Presence	Indicates whether the attendance code counts towards membership totals.

Sort	The sort order of the attendance code appears as it is in the attendance codes pop-up menu on the student attendance pages.

How to Add an Attendance Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Click **New**. The New Attendance Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter an attendance code. Attendance codes can use characters A-Z, 0-9 and _- (underscore and hyphen). Attendance codes are not case-sensitive. There are other restrictions, including the code must be unique for this school and year and cannot be the same name as a Code Category for this school. **Note:** By default, only single-character attendance codes are allowed. However, to create multiple-character attendance codes, select the **Enable multiple character attendance codes** checkbox on the Attendance Preferences page.
Description	Enter a description for the attendance code.
Presence Status	All attendance codes are categorized as present or absent. Indicate whether the attendance code should be categorized as present or absent by selecting the appropriate option.
Code Categories	Attendance code categories are used to group attendance codes by classification for reporting and searching purposes. In order for an attendance code to count as an attendance code category, the attendance code must be associated to that attendance code category. Indicate which attendance code category you want to associate to this attendance code by selecting the appropriate checkbox.

Points	Enter the number of attendance points a student receives for this attendance code, such as absent=1, tardy=2, and present=0.
Teacher can assign	Use the pop-up menu to choose whether teachers can assign this attendance code in PowerTeacher.
This attendance code is considered in ADA calculations	Select the checkbox if this attendance code should be considered in Average Daily Attendance (ADA) calculations.
This attendance code counts towards membership	Select the checkbox if this attendance code counts towards Average Daily Membership (ADM).
Sort order for display	Use the pop-up menu to choose a sort order of this attendance code as it appears in the attendance codes pop-up menu on the student attendance pages.

5. Click **Submit**. The Attendance Codes page displays the new attendance code.

How to Edit an Attendance Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Click the code or description of the attendance code you want to edit. The Edit Attendance Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Attendance Code*.
5. Click **Submit**. The Attendance Codes page displays the edited attendance code.

How to Delete an Attendance Code

When deleting an attendance code, other users and student records may be directly impacted. Deleting an attendance code is not recommended unless the attendance code was created in error. If the attendance code is already in use, it cannot be deleted.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Click the code or description of the attendance code you want to delete. The Edit Attendance Code page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Sort Attendance Codes

Though you must choose a sort order of 1 for the "present" attendance code, you can change the sort order of the other attendance codes without using the Edit Attendance Code page.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Codes**. The Attendance Codes page appears.
3. Choose different sort orders for the attendance codes from the **Sort** pop-up menus.
4. Click **Submit**. The page re-sorts the attendance codes.

Attendance Conversions

Set up attendance conversions to calculate attendance. You can create multiple attendance conversion methods, such as Full Day or Half Day. For example, a student receives only a half-day of attendance credit if he or she is absent for two to four periods and receives no credit if absent for five or more periods. After creating attendance conversions, set up attendance conversion items. For more information, see *Attendance Conversion Items*. For more information about attendance, see *Attendance Overview*.

How to Access the Attendance Conversions Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversions**. The Attendance Conversions page displays the following information:

Field	Description
Attendance Conversion	The name of the attendance conversion

<table>
<tr><td>FTE</td><td>The name of the Full Time Equivalent (FTE). Students with one FTE can have a different set of conversions than students with a different FTE.</td></tr>
<tr><td>[Attendance Conversion Item]</td><td>The types of attendance conversion items you can create, edit, or delete:
Period - Use to define the number of periods in which the student must be present/absent to receive the number of points ADA value you define.
Code - Use to define the full day ADA value you want a student to receive when a specific attendance code is given.
Time - Use to define the cut off points for attendance and the ADA value a student should receive at each.
Percent Period - Use to define the percent of periods in which the student must be present/absent to receive the number of points ADA value you define.
Percent Time - Use to define the percentage of time for which a student must be present/absent to receive the number of points ADA value you define.
Note: Period and Time conversions work with daily attendance and partial attendance and can contribute to both full day and partial day ADA values. Whereas, code conversion only works with daily attendance and can only contribute to full day and partial day ADA values.

One of the following displays for each attendance conversion item entry:
Defined – Indicates attendance conversion items have been defined.
(NONE) – Indicates no attendance conversion items have been defined.
Note: Values may vary slightly when Day Part Attendance is not enabled.</td></tr>
</table>

How to Add Attendance Conversions

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **New**. The New Attendance Conversion page appears.
4. Enter the name for the attendance conversion.
5. Click **Submit**. The Attendance Conversions page displays the new attendance conversion.

How to Edit Attendance Conversions

You can edit the name of an attendance conversion. To edit conversion items, see *Attendance Conversion Items*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click the name of the attendance conversion you want to edit. The Edit Attendance Conversion page appears.
4. Edit the name of the attendance conversion.

   Note: If the attendance conversion is being used by a bell schedule, links to the bell schedule appear. Click the name of the bell schedule to access the Edit Bell Schedule page. For more information, see *How to Set Up Bell Schedules*. Click the duration of the bell schedule to access the Bell Schedule: [Name] page. For more information, see *How to Set Up Bell Schedule Items*.

5. Click **Submit**. The Attendance Conversions page displays the edited attendance conversion.

How to Delete Attendance Conversions

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click the name of the attendance conversion you want to delete. The Edit Attendance Conversion page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Attendance Conversion Items

PowerSchool uses attendance conversion items to calculate attendance for the purposes of state and provincial reports and student records. There are three types of attendance conversion items you can create for each attendance conversion method: period, code, and time.

Note: Period and Time conversions work with daily attendance and partial attendance and can contribute to both full day and partial day ADA values. Whereas, code conversion only works with daily attendance and can only contribute to full day and partial day ADA values. For more information about code conversion, see the *Attendance User Guide* available on PowerSource.

Period Items

For each period item, define the number of periods in which the student must be present/absent to receive the number of points ADA value you define.

Note: If a bridge period section is not configured within your bell schedule, period items are not counted in the period to day conversion.

How to Add Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** in the Period column next to the conversion item for which you want to add period items. The Period-to-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Periods Present / Periods Absent	Period items can be configured for periods present or absent. Present is used if your school calculates attendance using the number of periods a student is present in a day. Absent is used if your school calculates attendance using the number of periods a student is absent in a day.

	Note: To configure, see the **Count these codes for period conversion** setting in the *Attendance User Guide* available on PowerSource.
Day Attendance Value	If **Period Present**, enter the number of attendance points students receive toward full day ADA if they are present, based on the number of periods in the **Period Present** column. For example, students are counted as absent for the entire day if they are present for zero or one period, enter **0** in the fields next to 0 and 1 periods present. If **Period Absent**, enter the number of attendance points students receive if they are absent, based on the number of periods in the **Period Absent** column.
AM Attendance Value	If **Period Present**, enter the number of attendance points students receive toward partial day ADA for the AM day part if they are present, based on the number of periods in the **Period Present** field. If **Period Absent**, enter the number of attendance points students receive toward partial day ADA for the AM day part if they are absent, based on the number of periods in the **Period Absent** field. **Note:** This field only appears if Day Part Attendance is enabled.
PM Attendance Value	If **Period Present**, enter the number of attendance points students receive toward partial day ADA for the PM day part if they are present, based on the number of periods in the **Period Present** field. If **Period Absent**, enter the number of attendance points students receive toward partial day ADA for the PM day part if they are absent, based on the number of periods in the **Period Absent** field. **Note:** This field only appears if Day Part Attendance is enabled.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit period items. The Period-to-Day Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Period Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Code Items

For each code item, define the ADA value you want a student to receive when a specific attendance code is given.

Note: Code is not applicable if Day Part Attendance is enabled. For more information, see the *State and Provincial Reporting Day Part Attendance Setup Guide* available on PowerSource.

How to Add Code Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** in the Code column next to the conversion item for which you want to add code items. The Code-to-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description

Attendance Value	For each attendance code, enter the number of attendance points students receive if they are marked with that attendance code.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy code items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Code Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit code items. The Code-to-Day Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Code Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Time Items

For each time item, define the cut off points for attendance and the ADA value a student should receive at each.

How to Add Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** next to the conversion item for which you want to add time items. The Time-To-Day Attendance Conversion page appears.

4. Use the following table to enter information in the fields:

Field	Description
Minutes Present	Enter the minimum number of minutes a student must be present to earn the number of attendance points specified in the next field. Use the first row for zero minutes present. **Note:** Only numeric values containing no decimals may be entered.
Day Attendance Value	Enter the number of attendance points students receive toward the full day ADA value if they are present, based on the number of minutes you enter in the **Minutes Present** field.
AM Attendance Value	Enter the number of attendance points students receive toward the partial day ADA value for the AM day part if they are present, based on the number of minutes in the **Minutes Present** field. **Note:** This field only appears if Day Part Attendance is enabled.
PM Attendance Value	Enter the number of attendance points students receive toward the partial day ADA value for the PM day part if they are present, based on the number of minutes in the **Minutes Present** field. **Note:** This field only appears if Day Part Attendance is enabled.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit time items. The Time Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Time Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Percent Period Items

For each period item, define the percent of periods in which the student must be present/absent to receive the number of points ADA value you define.

Note: If a bridge period section is not configured within your bell schedule, period items are not counted in the period to day conversion.

How to Add Percent Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** in the Percent Period column next to the conversion item for which you want to add percent period items. The Percent-Period-To-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Percent Present	Enter the percentage of periods in a student's schedule that they must be present to earn the number of attendance points specified in the next field. Use the first row for zero percent periods present.
Day Attendance Value	Enter the number of attendance points students receive toward the full day ADA value if they are present, based on the percentage of periods you enter in the **Percent Present** field.

Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Percent Period Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit percent period items. The Period-to-Day Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Percent Period Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Percent Time Items

For each time item, define the percentage of time for attendance and the ADA value a student should receive at each.

How to Add Percent Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **(NONE)** next to the conversion item for which you want to add time items. The Percent-Time-To-Day Attendance Conversion page appears.
4. Use the following table to enter information in the fields:

Field	Description
Percent Present	Enter the percentage of minutes in a student's schedule that they must be present to earn the number of attendance points specified in the next field. Use the first row for zero percent minutes present.
Day Attendance Value	Enter the number of attendance points students receive toward the full day ADA value if they are present, based on the percentage of minutes you enter in the **Percent Present** field.
Comments	Enter any comments that are relevant to this attendance conversion item.

Note: Alternatively, click **Copy From Other Conversion Table** to copy period items from another conversion table. Select the attendance conversion to be copied and click **Submit**.

5. Click **Submit**. A confirmation message appears.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

How to Edit Percent Time Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Attendance Conversion**. The Attendance Conversions page appears.
3. Click **Defined** next to the conversion item for which you want to edit percent time items. The Percent Time Attendance Conversion page appears.
4. Edit the information as needed. For field descriptions, see *How to Add Percent Time Items*.
5. Click **Submit**.
6. Click **Attendance Conversions** in the navigation path to return to the Attendance Conversions page.

Attendance Indicator

On the PowerTeacher start page, a dot appears next to each class' Chair icon. The color of the dot indicates whether or not the teacher has taken attendance for that class. A clear dot indicates attendance has not been taken. A yellow dot and fraction indicates partial attendance has been taken. A green dot indicates attendance has been taken.

To provide you with flexibility, you can customize the attendance indicator images by replacing them with graphics of your own. You can switch these images as often as you like. For example, you may want to switch your images seasonally by using such images hearts, four-leaf clovers, autumn leaves, or snowmen.

How to Customize the Attendance Indicator

1. Determine the replacement images.
2. Name the replacement images accordingly:
    - For the image that indicates that attendance has not been taken (clear dot), use **attendancetaken_no.png**.
    - For the image that indicates that partial attendance has been taken (yellow dot), use **attendancetaken_some.png**.
    - For the image that indicates that attendance has been taken (green dot), use **attendancetaken_yes.png**.
3. On your PowerSchool Server, navigate to **data > custom > web_root**.
4. Create an **images** folder, if one does not already exist.
5. Open the **images** folder.
6. Copy the replacement images to this folder.

Attendance Preferences

Use the attendance Preferences page to specify general attendance preferences. Each preference is school- and year-specific. For global preferences at the district level, see *Global Attendance Preferences*.

Use the Quick Lookup Preferences page to specify attendance preferences as they relate to the Quick Lookup page for each student.

For more information about attendance, see *Attendance Overview*.

Enable Enter Attendance Link on Student Pages Menu

To enable the Enter Attendance link to appear in the student pages menu, you must select Meeting or Interval as one of the attendance recording methods and set it as the default attendance recording page. You can use the Enter Attendance link as a shortcut to the Edit Meeting Attendance page or the Edit Interval Attendance page.

How to Specify General Attendance Preferences

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Preferences**. The Attendance Preferences page appears.
3. Use the following table to enter information in the Recording section:

Field	Description
Attendance recording methods	Select the appropriate checkboxes that apply (any combination of the four options is valid): • **Meeting** to record attendance by meeting for this year • **Daily** to record attendance by day for this year • **Time** to record attendance this year by entering a time value • **Interval** to record attendance this year according to a specified time interval **Note:** This setting affects which tabs appear on the Attendance page. For more information, see *Attendance*.
Audit attendance records	Select the checkbox to enable auditing of attendance. After an attendance record is initially created, PowerSchool keeps track of any change, its previous value, and who made the change.
Default attendance page	Use the pop-up menu to indicate the default attendance page to display when viewing student attendance. The items that appear in the pop-up menu vary based on the attendance recording methods you select. **Note:** This setting affects which tab appears as the default tab on the Attendance page. For more information, see *Attendance*.
Enable multiple character attendance codes	By default, you can only create single-character attendance codes. To create multiple-character attendance codes, select the checkbox.
Meeting and daily attendance bridge	When using both Meeting and Daily attendance modes, this setting allows you to synchronize attendance records based on a bridge period. You can define a bridge period in each bell

	schedule. To create and synchronize Daily attendance records based on the bridge period, select **One-Way**. To keep the corresponding meeting attendance record synchronized whenever a change is made to a daily attendance record, select **Two-Way**. **Note:** It is not necessary to bridge Meeting and Daily attendance. Daily attendance can be managed manually. However, bridging attendance does provide a convenient way of automatically creating and maintaining attendance when both attendance modes are in use. Bridging attendance only functions with sections and section enrollments, which reside in the same school.
Number of school days teachers may alter attendance prior to current date (PowerTeacher)	Use the pop-up menu to indicate how far back teachers can alter attendance in PowerTeacher. The default is set to 14 days. **Note:** This setting does not apply to PowerSchool.
Number of school days teachers may alter attendance after the current date (PowerTeacher)	Use the pop-up menu to indicate how far forward teachers can alter attendance in PowerTeacher. The default is set to 7. **Note:** This setting does not apply to PowerSchool.

Show Saturday and Sunday on attendance views	Select the checkbox to display Saturday and Sunday on attendance views. This is typically not needed unless you have in-session days on weekends where student attendance marks need to be displayed. The following pages will display Saturday and Sunday:
	
	• PowerSchool admin portal
	    • Student Selection > Enter Attendance
	    • Student Selection > Attendance (Meeting, Daily, Time)
	    • Student Selection > Bell Schedule View
	    • Student Selection > Quick Lookup (Meeting, Daily, Program)
	    • School > Sections > Section > Multi-day Attendance

<table>
<tr><td></td><td>

Teacher Schedules > Teacher > Multi-day Attendance
PowerTeacher portal
Section > Multi-day Attendance
PowerSchool Student and Parent portal
Grades and Attendance
Attendance History
My Schedule

</td></tr>
<tr><td>Start of Week</td><td>
Indicate the day of the week that you want attendance and the bell schedule to start by choosing Sunday or Monday from the pop-up menu. The following pages will start with the selected day:

PowerSchool admin portal
Student Selection > Enter Attendance
Student Selection > Attendance (Meeting, Daily, Time)
Student Selection > Bell Schedule View
Student Selection > Quick Lookup (Meeting, Daily, Program)
School > Sections > Section > Multi-day Attendance
Teacher Schedules > Teacher > Multi-day Attendance
PowerTeacher portal
Section > Multi-day Attendance
PowerSchool Student and Parent portal
Grades and Attendance
Attendance History
My Schedule

Note: If the Show Saturday and Sunday checkbox is deselected, then the week will start on Monday regardless of the selected day.
</td></tr>
<tr><td>Interval Duration (in Minutes)</td><td>
Interval attendance is primarily intended for alternative education programs that require attendance to be taken every hour.

When using Interval Attendance mode, the number of opportunities for which attendance can be recorded during a given class is determined by dividing the bell time for the class by the interval duration. For instance, if a class is 90 minutes long
</td></tr>
</table>

	and the interval duration is 60 minutes, then there will be two opportunities provided to take attendance. The first is at the beginning of class and the second is after 60 minutes has gone by. The default for this field is 60 minutes.

4. Use the following table to enter information in the Calculating and Reporting section:

Field	**Description**
Calculation accuracy	Enter the number of decimal places to use when calculating attendance values.
Count Meeting attendance recorded at another school for students enrolled at this school	If a student is enrolled in a class at another school, and there is attendance associated with that class, select this option to include this attendance when calculating Average Daily Attendance (ADA).
Count these codes for period conversion	This setting determines what is counted and subsequently used as the value for looking up the day's attendance, specifically for Period conversion. Use the pop-up menu to select **Presents** if your school calculates attendance using the number of periods a student is present in a day. Select **Absences** if your school calculates attendance using the number of periods a student is absent in a day.
Round or truncate	Use the pop-up menu to indicate how you want the system to handle long decimals that exceed the maximum when calculating attendance.

5. Use the following table to enter information in the Daily Attendance Calculations section:

Field	**Description**

Enable ADA Periods and Passing Time Deductions	To enable, see *How to Specify Attendance Preferences* for Daily Time Exclusion. For more information, see the *Daily Time Exclusion*.
Deduct Passing Time	To enable, see *How to Specify Attendance Preferences* for Daily Time Exclusion. For more information, see the *Daily Time Exclusion*.

6. Use the following table to enter information in the Consecutive Absences Notification section:

   Note: No calculations are performed nightly for a school until these settings are submitted.

Field	Description
Enable Notification	Select the checkbox to enable the Consecutive Absences Notification. Once enabled, consecutive absences for in session calendar days are automatically calculated as part of the nightly process. A notification appears on the Attendance pages identifying students who have been absent for an extended period of consecutive day (as indicated by the Notification Threshold). For more information, see *Attendance Data Grid*.
Minimum Days Stored	Enter the minimum number of consecutive (in session calendar) days a student must be absent in order for a record to be generated in the ConsecutiveDaysAlert table. Defaults to **1**.
Maximum Days Stored	Enter the number of in session calendar days earlier than the current system date that will be searched per student for consecutive absences if the Minimum Days Stored value is met. Defaults to **20**.
Notification Threshold	Enter the minimum number of consecutive (in session calendar) days a student must be absent in order to trigger the notification. The value must be between the Minimum Days Stored and Maximum Days Stored values. Defaults to **1**.

7. Click **Submit**. The Changes Recorded page appears.

How to Specify Quick Lookup Preferences

The Quick Lookup page displays absences, tardies, final grades, and citizenship codes for each student in the following areas of PowerSchool:

- Quick Lookup page in PowerSchool and the PowerTeacher portal
- Grades and Attendance page in PowerSchool for Students and Parents
- PowerSchool Mobile

You can choose whether to count attendance for sections that meet multiple times per day as single or multiple instances. For example, if a student misses a class that meets during 2 periods per day, you can specify whether that student's Quick Lookup page displays a 1 or 2 for the number of absences for that class. This setting also affects how the number of absences appears in PowerTeacher Gradebook.

For more information about the Quick Lookup page, see *Student Page Layout*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Quick Lookup Preferences**. The Quick Lookup Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Store Code	Displays the store code for the final grades, citizenship codes, and any store codes used only for historical grades.
Enabled Parent/Student	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool Student and Parent portal and PowerSchool Mobile. Deselect the checkbox to disable the display of this data.
Enable Teacher	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool Teacher portal. Deselect the checkbox to disable the display of this data.
Enable Admin	Select the checkbox to enable the display of final grades and citizenship codes in PowerSchool administrator portal. Deselect the checkbox to disable the display of this data.

Source of Data	Indicate which final grade and citizenship codes you want to display by choosing one of the following from the pop-up menu: • **Gradebook (Current)**: to display the final grade and/or citizenship codes that currently exists in the teacher's PowerTeacher Gradebook. • **Historical (Stored)**: to display the final grade and/or citizenship codes from the student's historical file or after the completion of a grading term. Store Codes that only exist as historical grades will always come from the historical file.

4. Select the **Count Multi-Period Meeting Attendance Once Per Day** checkbox to count only one attendance instance for a class that meets more than once per day. Deselect the checkbox to count attendance for each period.
5. Select the **Show Citizenship Grade** checkbox to display the citizenship grade on the Quick Lookup page. Deselect the checkbox to disable the display.
6. Click **Submit**. The Changes Recorded page appears.

Full-Time Equivalencies

Attendance calculations support full-time equivalencies (FTEs). FTEs are a powerful tool used in schools that need to associate groups of students with different attendance values for the same day, for example, full-time and half-time students.

FTEs are also used to determine default settings for reporting on Average Daily Attendance and Average Daily Membership (ADA/ADM). These settings include the default attendance mode and their conversion types. For **Meeting**, you can choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. For **Daily**, you can choose **Code to Day**, **Percent Time to Day**, or **Time to Day**. And, for **Interval**, you can choose **Time to Day**. FTEs are school- and year-specific but will be duplicated when new years are created.

Using Full-Time Equivalencies (FTE) page, you can set up and use FTEs to indicate what portion of a school day students attend.

Note: If this is the first time you have accessed the Full-Time Equivalencies (FTE) page, you will notice an FTE of 1 was created. This is to maintain backwards compatibility, as previously PowerSchool assumed students were full-time.

For more information about attendance, see *Attendance Overview*.

Set Students' FTEs

Once attendance is set up, you will need to set students' FTEs for school enrollments via the student Transfer Information page.

FTE is a grouping that associates a student's school enrollment with a set of attendance conversion values. When ADA runs, for a student, it runs for each school enrollment during the report dates. When processing each school enrollment, it uses the student's FTE to locate the set of attendance conversions to use when looking up the attendance value for the day. For more information, see *Transfer Information*.

How to Access the Full-Time Equivalencies Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page displays the following information:

Field	Description
Name	The name of the FTE as it appears in the Full-Time Equivalency pop-up menu on the Edit Current/Previous Enrollment pages. The pop-up menu is used to associate an FTE with a student's current and historical school enrollment.
Description	A description of the FTE code.
Default Attendance Mode	Attendance mode that will be used for reporting purposes if a specific mode is not provided.
Default Attendance Conversion	Attendance conversion that will be used for reporting purposes if a specific conversion is not provided.

How to Add an FTE Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page appears.
3. Click **New**. The New FTE Code page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the FTE as you want it to appear in the Full-Time Equivalency pop-up menu on the Edit Current/Previous Enrollment pages. The pop-up menu is used to associate an FTE with a student's current and historical school enrollment.
Default Attendance Mode	Choose one of the attendance mode from the pop-up menu that will be used for reporting purposes if specific mode is not provided: • **Meeting** • **Daily** • **Interval**
Default Attendance Conversion	Choose the attendance conversion from the pop-up menu that will be used for reporting purposes if a specific conversion is not provided. If you selected **Meeting** as your **Default Attendance Mode**, you can choose **Percent Period to Day**, **Percent Time to Day**, **Period to Day**, or **Time to Day**. If you selected **Daily** as your **Default Attendance Mode**, you can choose **Code to Day**, **Percent Time to Day**, or **Time to Day**. If you selected **Interval** as your **Default Attendance Mode**, you can choose **Time to Day**.
Description	Enter a description of the FTE code.
Default for These Grades	Indicate which grades you want the FTE code to be applied to by selecting the appropriate checkboxes. These checkboxes determine what FTE a student of a particular grade level will be assigned when the End of Year process moves them into their new grade for the next year. The values should be defined for the upcoming school year's FTEs before running the End of Year process for the current school year.

5. Click **Submit**. The Full-Time Equivalencies (FTE) page displays the new FTE code.

How to Edit an FTE Code

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page appears.
3. Click the name or description of the FTE code you want to edit. The Edit FTE Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an FTE Code*.
5. Click **Submit**. The Full-Time Equivalencies (FTE) page displays the edited FTE code.

How to Delete an FTE Code

When deleting an FTE code, other users and student records may be directly impacted. Deleting an FTE code is not recommended unless the FTE code was created in error. If the FTE code is already in use, it cannot be deleted.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Full-Time Equivalencies (FTE)**. The Full-Time Equivalencies (FTE) page appears.
3. Click the name or description of the FTE code you want to delete. The Edit FTE Code page appears.
4. Verify this is the FTE code category you want to delete.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Global Attendance Preferences

Use the Global Attendance Preferences page to configure attendance information that appears on the Quick Lookup pages.

How to Set Global Attendance Preferences

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Attendance, click **Attendance**. The Global Attendance Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Suppress attendance display on Quick Lookup…	Select the checkboxes to hide attendance counts per enrolled course and attendance totals on the students' Quick Lookup pages for the following users: • **…for parent users?** • **…for student users?** • **…for teacher users?** • **…for admin users?**

4. Click **Submit**. The Changes Recorded page appears.

Section Attendance Settings

Use the Section Attendance Settings page to create sections where attendance will be taken every period. These sections are sections created for the sole purpose of taking attendance in a section that meets more than once per day.

For example, if a section of Biology 101 meets during Period 1 for lecture during each day of a two-day cycle and also meets during Period 3 for field study on alternating days, the expression for this section would be 1(A-B) 3(A). If you do not use this option, attendance taken during 3(A) will overwrite attendance taken during 1(A).

For more information about attendance, see *Attendance Overview*.

How to Define Section Attendance Settings

Perform the following procedure to create sections where attendance will be taken every period and either your school has committed a master schedule with sections or sections are created from the School Setup page.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Attendance, click **Section Attendance Settings**. The Section Attendance Settings page appears.
3. Use the following table to enter information in the fields:

Field	Description

Course Name	The name of the course appears. Click the course name to display the Edit Course page.
Course Number	The number of the course appears. Click the course number to display the Edit Course page.
Section Number	The number of the section. Click the section number to display the Edit Section page.
Expression	The expression, or period and day combination, for the section appears. Click the expression to display the Edit Section page.
Teacher	The section's teacher appears. Click the teacher's name to display the teacher's current schedule.
Room	The section's room appears. Click the room to display the Edit Section page.
Term	The term abbreviation in which the section is taught appears. Click the term to display the Term page.
Mark	Select the checkbox to take attendance each period separately.

4. Click **Submit**. The Section Attendance Settings: Result page appears.

   Note: To redisplay the Section Attendance Settings: Result page from the School Setup page, click **Section Attendance Settings** and then **Section Attendance Settings: Result**.

Grading

Class Rank

Use class rank to determine the order of students when sorted by grade point average (GPA). For example, the student with the highest GPA ranks at the top of the class. Since class rank calculates based on GPAs, the appropriate GPA calculation methods must exist before determining class rank.

Create a class rank method to set parameters for calculating the class rank. Use multiple class rank methods with varying settings to determine multiple sets of class rankings. For example, you can rank all current students using one method and then rank all current students plus students who graduated early using another method.

Class rank is calculated either manually or automatically at specified intervals, such as every week or only after grades are stored. Since calculating class rank affects all class rank methods, it is best to avoid creating more class rank methods than necessary.

Note: Though you can edit class rank methods, you cannot delete class rank methods via the Class Rank Settings page. Instead, you must use Direct Database Access to remove the class rank method. For more information, see *Direct Database Export*.

View the results of the class rank calculation using the Class Ranking Report. For more information, see *How to Run the Class Ranking Report*. You can also include class rank data access tags on custom reports and exports. For more information about data codes, see *PowerSchool Data Codes*.

How to Add a Class Rank Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Class Rank Methods**. The Class Rank Methods page appears.
4. Click **New**. The Class Rank Method page appears.
5. Use the following table to enter information in the fields:

Field	Description
Description	Enter a description of the class rank method, such as **Class Rank - Simple GPA**.
GPA Calculation Method	Select from the pop-up menu which GPA calculation method to use when calculating class rank. The GPA calculation method determines what is queried and how grades are calculated.
GPA result is	Select from the pop-up menu how you want to assess the class rank:

	• **Numeric** - Assesses rank numerically, such as giving the student with the highest GPA the rank of 1. This is the most commonly-used selection. • **Text** - Assesses rank alphabetically, such as giving the student with a GPA of A the rank of 1. Select this option when the GPA method returns a text value. For more information, see *GPA Calculation Methods*.
Only include grades	Select the checkbox to include only grades for courses or sections that count in class rank. **Note:** When selected, the class rank grade results may differ from GPA calculation results. This is the only class rank method setting that returns a result that may differ from the GPA.
Exclude students	Select the checkbox to exclude students that are set as excluded from class rank on the students' Other Information page. Some students may be excluded from class rank because they are enrolled for a short amount of time and should not be ranked amongst longer-term students. For more information about excluding a student from the class rank, see *Other Information*. Deselect the checkbox to override the student exclusion setting.
Include early graduates?	Select the checkbox to include students that graduate early. This checkbox filters students that have already exited the school using an exit code that identifies an early graduation. If selected, you must specify in the next field the early graduation exit code.
Early graduation exit code	If the checkbox in the previous field is selected, enter an exit code that specifies an early graduation.

6. Click **Submit**. The Class Rank Methods page displays the new class rank method.

How to Edit a Class Rank Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.

3. Click **Class Rank Methods**. The Class Rank Methods page appears.
4. Click the name of the class rank method you want to edit. The Class Rank Method page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Class Rank Method*.
6. Click **Submit**. The Class Rank Methods page displays the edited class rank method.

How to Recalculate Class Rank

To refresh class rank data, recalculate all class rank methods either manually or at specified intervals.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Recalculation Frequency**. The Class Rank Recalculation Frequency page appears.
4. Select at which frequency the class rank should recalculate:
    - **Daily** - Recalculates automatically during the nightly process
    - **Weekly** - Recalculates automatically each weekend
    - **Monthly** - Recalculates automatically once per month
    - **After storing grades** - Recalculates automatically each time grades are stored
    - **Manually** - Never recalculates automatically

      Note: To manually recalculate the class rank, click **Recalculate now**. The class rank recalculates immediately. Once complete, the Changes Recorded page appears.
5. Click **Submit**. The GPA Options Changed page appears.

Current Grade Display

Use Current Grade Display to set how PowerSchool displays a student's grade and attendance information in the following areas of PowerSchool:

- Quick Lookup page in PowerSchool
- Grades and Attendance page in the PowerSchool Student and Parent portal
- PowerSchool Mobile

Update the settings on this page at the end of each grading term to be sure administrators, administrative staff, and parents view the most up-to-date information for students.

How to Add or Edit Current Grade Display

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Current Grade Display**. The Current Grade Display page appears.
3. In the **Current Grade** field, enter the store code for the current grading term. PowerSchool uses this value to determine which grade to display in all current grade fields, GPA calculations on the Quick Lookup page, and Data Access Tag (DAT) calculations.
4. Click **Submit**.

End-of-Year Process

As the end of the school year approaches, the process of ending the year in PowerSchool becomes significant. To close out the recently completed school year and prepare for the upcoming school year, review PowerSchool's entire end-of-year process, including the procedures that must be performed before actually executing the end-of-year function.

The end-of-year function performs the following:

- Validates that students have Next School set for the current year prior to running this function.

  Note: If students do not have these values set, use the Set Next School Group Function to enter the values.

- Validates that a school year term for the next school year has been set up in all schools.
- Promotes, retains, or demotes students according to each students Next Grade Level.
- Transfers students from one school to another (in multi-school environments) according to each student's Next School Indicator.
- Graduates students from district if Next Grade Level is set to 99 and their Next School is set to 999999 (Graduating Students School).
- Sets each student's Exit Date according to the last day of the school year for that school.
- Sets the Next Grade for the new enrollment to the next highest grade level.
- Sets the Next School for the new enrollment to the current school for all students not in the highest grade at the school.
- Sets the Next School for the new enrollment to the school's default graduating school if student is enrolled in the school's Highest Grade.

- Carries forward lunch balances while clearing out all financial lunch activity records, including:
    - Removes all individual meal transactions (GLDetail records) for all students and staff members.
    - Moves the current balances for students and staff into the starting balance field.

      Note: The end-of-year process does not change fee balances and transactions.

- Removes all records of parental access to student records via Internet and telephone, including:
    - PhoneLog records
    - DBLog records
    - Sign In records
    - Bulletin records
- Copies Courses records to CoursesByYear Archive for the upcoming year.

Before using this function:

- Set up your next school year using valid dates for each school.
- Make sure the next year has been created at the District Office.
- Verify that students graduating from the district have their Next Grade Level set to 99 and their Next School set to 999999 (Graduating Students School).
- Shut your PowerSchool server down and make an export of your database. Then, store this backup in a safe place so it can be accessed if needed in coming years.
- If you want a separate, ASCII-export archive copy of your lunch transactions and/or historical grades, go to Export Data Archives (recommended).
- Run "Perform EOY Validation" process to make sure no validation errors occur.
- Be sure that the server is able to run uninterrupted (without being shut down) while this process runs through to completion (up to 4 hours).
- Note that this process is irreversible.

IMPORTANT: The End-of-Year process will assign students to an FTE for next year based on the "Default for these Grades" FTE option. Please ensure that FTEs exist for next year and that all grade levels have been tied to an FTE for next year, from the School Setup > Full-Time Equivalencies (FTE) > Edit FTE Code page(s). This should be done for all schools in the upcoming school year. If not done, students will not have a valid FTE for next year, and ADA calculations will be inaccurate unless FTEs are manually assigned.

How to Perform the End-of-Year Process

For instructions on preparing for, validating, and running the end-of-year process, see the *End-of-Year Process Guide* available on PowerSource.

End-of-Summer-School Process

The End-of-Summer-School Process functions in the same manner as the End-of-Year Process. When your summer school session has ended, use the End-of-Summer-School Process to close out the session.

This function:

- Clears students' SummerSchoolIDs and SummerSchoolNotes.
- Carries forward or clears students' fee balances.

Before using this function:

- Be sure that the server is able to run uninterrupted while this process runs through to completion.
- Note this process is irreversible.

Note: For more information about End-of-Year Process, see *End-of-Year Process*.

How to Perform the End-of-Summer School Process

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Setup, click **System**. The System Administrator page appears.
3. Click **End-of-Summer School Process**. The End-of-Summer School Process page appears.
4. Use the following table to enter information in the fields:

Field	Description
Transfer Method	Do one of the following: • Select the **Roll over the current balance** to roll any fee balances from the Summer School to the student's current home school and school year. • Select the **Zero the current balance** to zero out any fee balances from Summer School.

5. Click **Perform End-of-Summer-School Processing**. A confirmation message appears.

Grade Scales

Create multiple grade scales and assign them to different courses or sections. For example, grades given for AP Calculus count more towards a student's GPA than grades for Basic Math. Assign the two courses to different grade scales. For more information about assigning grade scales to courses, see *Course Grade Scales*.

The grade scales you define become the set of grades that are possible to use at all schools on your PowerSchool system. The value of a grade is determined when an historical grade is given to a student taking a particular course. Even if the grade scale for that course changes, the values of that student's grade do not change.

Grade scales include color levels for each item in the scale. Grade scale color levels provide a visual indicator of student progress that can be consistent and aligned across all different types of grade scales. These color levels are used in other parts of PowerSchool, such as in the At Risk Student Dashboard in PowerSchool or on the Class Progress page in PowerTeacher Pro. When you create a new grade scale, select the number of colors associated to the grade scale. Once you generate the grade scale table, select the color level for each grade. Available colors include dark green, green, yellow, orange, and red. Depending on the number of items in the grade scale, the color levels may include different shades of these colors.

In an A, B, C, D, F grade scale:

- Dark green - Equates to a grade of A
- Green - Equates to a grade of B
- Yellow - Equates to a grade of C
- Orange - Equates to a grade of D
- Red - Equates to a grade of F

These color levels appear in PowerTeacher Pro.

Alpha Grade Scales

An alpha grade scale uses letter grades such as A, B, and C+ or E, S, and N, or descriptive grades such as Excellent, Satisfactory, and Unsatisfactory. With the exception of some new options, alpha grade scales are largely unchanged for PowerTeacher Pro.

Common Examples of Alpha Grade Scales:

- Traditional scales - A,B,C,D,F
- Elementary school - Outstanding, Satisfactory, Need Improvement (O,S,N), or alpha-based proficiency scale: Exceeds, Meets, Approaching, Basic (E,M,A,B)

Note: If you are creating grade scales using numbers, use the Numeric Grade Scales process. For more information, see Numeric Grade Scales.

- GPA and Credit - Show or hide these fields as needed.
- Term Weighting - Average final grades or term weighting points. Show or hide these fields as needed.

  Note: If your school uses average final grades, you may not need to using term weighting points in PowerTeacher Pro.

How to Create an Alpha Grade Scale

You must be signed in to the District office.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click **New**. The New Grade Scale page appears.
4. Use the following table to enter information in the fields:

Type	**Description**
Name	Enter a name for the grade scale.
Type	Select **Alpha** from the pop-up menu.
Use	Select an option from the pop-up menu. This determines where this grade scale will be used. • **Traditional Grade** • **Standards** • **Traditional Grade and Standards**
Description	Enter a description for the grade scale.
Use Special Codes	Create a grade scale before adding special codes. Teachers can manually assign special codes and final course grades, but they are never calculated in to the final grade. Special

	codes can also be made available to use on assignments, and act as district pre-created Gradebook Score Codes for the teacher. For example: • A teacher manually assigns Incomplete for a final grade, but the assignment scores never calculate into Incomplete. • A teacher manually enters an assignment score code of ABS to indicate that the student was absent.
Scale Used in GPA and Course Credit	Selected by default. Deselect the checkbox if your school does not use GPA and Course Credit with this scale. **Note:** This option is not available for use with standards.
Show Term Weighting and Average Final Grades (AFG)	Deselected by default. Select the checkbox to display Term Weighting Points when editing this grade scale. **Note:** If you were using average final grades, you may be able to do that in PowerTeacher Pro with term weighting points when you want to average across multiple classes. Otherwise, the new term weighting points will allow you to calculate grades based on points rather than percent.
Repeated Course Grade Suppression Policy	Choose the repeated course grade suppression policy you want to enable from the pop-up menu. If enabled, stored grades associated to this grade scale will be evaluated based on the selected repeated course grade suppression policy during the permanently store grades process. **Note:** The default is set to **None** indicating that stored grades associated to this grade scale will be included in the stored grades process but will be excluded from the repeated course grade suppression portion of the process. **Examples** For example, you may want to create separate grade scales for courses such as these:

	• The following example illustrates when you might want to allow repeated course grade suppression. The high school Algebra course is a requirement for students wanting to apply to college. Some students may need to repeat the course in order to receive a passing grade and those grades should be evaluated for repeated course grade suppression. • The following example illustrates when you might want to not allow repeated course grade suppression. The high school Band course is expected to be repeated by students each year and those grades should not be evaluated for repeated course grade suppression. **Note:** For more information, see *Repeated Course Grade Suppression*.
Enter Starting Grade Scale Items	Enter the grades you would like to populate in the Grade Scale table. Use commas to separate values, for example A+, A, A-, B+, B, B-, etc. When generated, the Grade Scale table will appear at the bottom of the page and will populate with the values you enter here.
Starting Number of Colors	Select the number of colors you want to appear associated to this grade scale. Grade scale color levels provide a visual indicator of student progress that can be consistent and aligned across all different types of grade scales.

5. Click **Generate Table**. The Grade Scale details table appears.
6. To create additional grades for this scale, click **Add Grade**. A new row in the Grade Scale details table appears.
7. Use the following table to enter information in the fields:

Field	Description
Grade	Required field. The information you entered in the Starting Grade Scale Items field appear.

	Enter the grade that you want to create for this grade scale, such as **A**, **B**, or **F**.
Description	Enter a description of the grade in the field, such as Superior. This description appears on grading reports.
Counts in GPA	Select the checkbox if this grade counts in the GPA. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Grade Points (GPA)	Enter the number of grade points to include in the GPA. You can enter up to and including the number 200. For example, an A could be worth 4.0 grade points, a B worth 3.0 grade points, and an F worth 0 grade points. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Added Value	Select the checkbox if teachers can enter a value for this grade that exceeds the normal grade points. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Grad Credit	Select the checkbox to determine that this grade earns credit towards graduation requirements. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Teacher Scale	Select the checkbox to indicate that teachers are allowed to use this grade scale.
Cutoff %	Required field. Enter the lowest percentage students can earn to receive this grade. For example, if you enter 93 for an A, then students must earn at least 93% of the total points to receive an A. The system uses the next highest cutoff percentage you define for a different

	grade to determine the highest percent grade students can earn to receive this grade. **Note:** This is a suggested cutoff for your teachers to use. Teachers can define their own cutoff percentages for this grade in PowerTeacher Gradebook if the selected grade scale is editable.
Grade Value	Required field. This field indicates the value of a letter grade when teachers give letter grades instead of numeric grades. Enter a number for the value of the letter grade; usually, this is in the middle of the range for the grade, such as 88 for a B+.
Color Levels / Edit	Use the pop-up menus to assign color levels to the grade. Divide the grade scale into 2-5 color groups for easy color identification for teachers. The colors appear in PowerTeacher Pro graphs and charts and display clear demarcation of proficiency.
Points	If your school will assign grades a GPA point value AND a grade averaging point value, use this field to indicate a grade averaging point value. Otherwise, leave blank. This field is used only when the **Use Alternative Grade Points in Calculation** checkbox on the Average Final Grades page is selected.
Cutoff Points	Use this field to indicate the lowest points students can earn to receive this grade. For example, if you enter 4.0 for an A, then students must earn at least 4.0 points to receive an A. The system uses the next highest cutoff points you define for a different grade to determine the highest points grade students can earn to receive this grade.
Exclude (AFG)	Select the checkbox to exclude this grade from the average final grade.
Action	Click the minus button to remove the grade from the grade scale.
Default Zero Cutoff	Select a grade from the pop-up menu to use as the default if no cutoff percentage is defined.

8. Click **Save**. The alpha grades scale is created.

Numeric Grade Scales

While numeric conversion scales already exist for standards grade calculation in PowerTeacher Gradebook, numeric grade scales are new for use in PowerTeacher Pro and can be used for both course grades and standards grades. As indicated at the beginning of this document, existing numeric conversion scales will be migrated as numeric grade scales.

Like a numeric conversion scale, a numeric grade scale is a number range (for example, 1-4). Usually, each number represents a level of proficiency. For example, 4=advances, 3=proficient, 2=approaching, 1=below. Numeric grade scales now allow calculations with just those numbers. For example, scores of 3 and 4 will average to 3.5. No percent conversion is needed.

Some districts want intermediary levels between whole numbers, for example 4, 3.5 and 3, or 4, 3+, and 3. You can do this without needing every other decimal. An example of a 1-4 scale with plus is 4, 3+, 3, 2+, 2, 1+,1. Alternately, you can include multiple decimal values. For example, a one decimal scale would have 3, 3.1, 3.2, 3.3, etc.

Special grades, like W or I, can still be used by creating a Special Codes grade scale. For more information, see Special Codes.

How to Create a Numeric Grade Scale

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click **New**. The New Grade Scale page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name	Enter a name for the grade scale.
Type	Select **Numeric** from the pop-up menu.
Use	Select an option from the pop-up menu. This determines where this grade scale will be used. • **Traditional Grade**

	• **Standards** • **Traditional Grade and Standards**
Description	Enter a description for the grade scale.
Use Special Codes	Create a grade scale before adding special codes. Teachers can manually assign special codes and final course grades, but they are never calculated in to the final grade. Special codes can also be made available to use on assignments, and act as district pre-created Gradebook Score Codes for the teacher. For example: • A teacher manually assigns Incomplete for a final grade, but the assignment scores never calculate into Incomplete. • A teacher manually enters an assignment score code of ABS to indicate that the student was absent.
Range	Enter the minimum and maximum values of this grade scale.
Scale Used in GPA and Course Credit	Selected by default. Deselect the checkbox if your school does not use GPA and Course Credit with this scale.
Include	Select a character from the pop-up menu to include in the grade scale values. Examples for each option appear below the pop-up menu when selected. If you are using this grade scale for standards, a **Decimals** pop-up appears. Select the decimal place value you want included in the grade scale.
Show Term Weighting and Average Final Grades (AFG)	Deselected by default. Select the checkbox to display Term Weighting Points when editing this grade scale. **Note:** If you were using average final grades, you may be able to do that in PowerTeacher Pro with term weighting points when you want to average across multiple classes. Otherwise, the new term

	weighting points will allow you to calculate grades based on points rather than percent.
Repeated Course Policy	Choose the repeated course grade suppression policy you want to enable from the pop-up menu. If enabled, stored grades associated to this grade scale will be evaluated based on the selected repeated course grade suppression policy during the permanently store grades process. **Note:** The default is set to **None** indicating that stored grades associated to this grade scale will be included in the stored grades process but will be excluded from the repeated course grade suppression portion of the process. **Note:** For more information, see *Repeated Course Grade Suppression*.
When Converting Other Scales Into This Scale	By default, numeric grade scales use cutoff values. You can edit these values when you generate the grade scale table.
Starting Number of Colors	Select the number of color levels you want to start with when creating this grade scale.

5. Click **Generate Table**. The Grade Scale details table for the new grade scale appears.
6. Use the following table to enter information in the fields:

Field	**Description**
Grade	The Min and Max Range you entered appears in this column.
Description	Enter a description of the grade in the field, such as Superior. This description appears on grading reports.
Numeric Cutoff	Use this field to indicate the lowest points students can earn to receive this grade. For example, if you enter 4.0 for an A, then students must earn at least 4.0 points to receive an A. PowerSchool uses the next highest cutoff points you define for a

	different grade to determine the highest points grade students can earn to receive this grade.
Numeric Value	This field indicates the value of a numeric grade when teachers give letter grades instead of numeric grades. Enter a number for the value of the letter grade; usually, this is in the middle of the range for the grade, such as 88 for a B+.
Color Levels / Edit	Use the pop-up menus to assign color levels to the grade. Divide the grade scale into 2-5 color groups for easy color identification for teachers. The colors appear in PowerTeacher Pro graphs and charts and display clear demarcation of proficiency.
Cutoff % To Numeric	Enter the cutoff percent value to use between grade scales.
% Value	Enter the value to use when this grade is marked on an assignment.

7. Click **Save**. The numeric grade scale is created.

Special Codes

Special Codes are new for PowerTeacher Pro, and while similar in some respects to Score Codes in PowerTeacher Gradebook, they have extended functionality. A special code may be used in conjunction with any grade scale you create. For example, you may create a special codes scale that includes alphanumeric codes, or you may create one that includes codes such as "Inc" for incomplete, or "Abs" for absent. When you associate a regular grade scale with a special codes scale, teachers can access all of the items on both scales.

Teachers can assign special codes as final course grades. For example, a teacher can use the special code to mark a final course grade as NC (no credit). However, special codes are never the result of a final grade calculation.

Special codes can also be used for assignment scoring. For example, a teacher marks an assignment as ABS to indicate that the student was absent for the assignment or uses another code to award a pre-defined percentage of the total points possible.

How to Create a Special Codes Grade Scale

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click **New**. The New Grade Scale page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name	Enter a name for the grade scale.
Type	Select **Special** from the pop-up menu.
Description	Enter a description for the grade scale.
Range	Enter the minimum and maximum values of this grade scale.
Scale Used in GPA and Course Credit	Selected by default. Deselect the checkbox if your school does not use GPA and Course Credit with this scale.
Show Term Weighting and Average Final Grades (AFG)	Deselected by default. Select the checkbox to display Term Weighting Points when editing this grade scale. **Note:** If you were using average final grades, you may be able to do that in PowerTeacher Pro with term weighting points when you want to average across multiple classes. Otherwise, the new term weighting points will allow you to calculate grades based on points rather than percent.
Enter Starting Grade Scale Items	Enter the grades you would like to populate in the Grade Scale table. Use commas to separate values, for example Abs,Inc,NC. When generated, the Grade Scale table will appear at the bottom of the page and will populate with the values you enter here.
Starting Number of Colors	Select the number of color levels you want to start with when creating this grade scale.

5. Click **Generate Table**. The Grade Scale details table for the new grade scale appears.
6. Use the following table to enter information in the fields:

Field	Description
Sort	Use the arrows to move the row up or down. This determines the order in which the special codes appear in PowerTeacher Pro.
Codes	Displays the Starting Grade Scale Items you entered.
Description	Enter a description of the grade in the field, such as Superior. This description appears on grading reports.
Use As a Final Grade	Select the checkbox if this special code can be used as the final grade.
Final Grade % Value	Enter a percentage value to assign for this special code when used as a final grade.
Final Numeric Value	Enter a numeric value to assign for this special code when used as a final grade.
Counts in GPA	Select the checkbox if the final grade value counts in the student's GPA. **Note:** This field displays if Description is selected.
Grade Points (GPA)	Enter the point value for this special code for the GPA. Enter the number of grade points to include in the GPA. You can enter up to and including the number 200. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Added Value	Select the checkbox if teachers can enter a value for this grade that exceeds the normal grade points. **Note:** This field displays if **Scale Used in GPA and Course Credit** is selected.
Grad Credit	Select the checkbox if this grade counts toward graduation credit.

	Note: This field displays if **Scale Used in GPA and Course Credit** is selected.
Alt. Grade Points	Enter alternate grade points to assign to this special code. If your school assigns grades a GPA point value AND a grade averaging point value, use this field to indicate a grade averaging point value. Otherwise, leave blank. This field is used only when the **Use Alternative Grade Points in Calculation** checkbox on the Average Final Grades page is selected. **Note:** This field displays if **Show Term Weighting and Average Final Grades (AFG)** is selected.
Exclude (AFG)	Select the checkbox to exclude this special code from the average final grade calculation. **Note:** This field displays if **Show Term Weighting and Average Final Grades (AFG)** is selected.
Color Levels	Use the pop-up menus to assign color levels to the grade. Divide the grade scale into 2-5 color groups for easy color identification for teachers. The colors appear in PowerTeacher Pro graphs and charts and display clear demarcation of proficiency.
Final Grade/Score is Exempt	Select the checkbox to make the assignment score exempt from calculating in to the final grade.
Final Grade/Score Incomplete	Select the checkbox to automatically assign the Incomplete attribute to the assignment score when using this special code in PowerTeacher Pro.
Use On Assignments	Select the checkbox to enable this special grade to be used to mark assignments.
Assignment % Value	Enter a percent value for this special code. This setting only applies when related to an alpha grade scale.
Assignment Numeric Value	Use the pop-up menu to select the numeric value for the assignment.

	• Select **Min** to use the minimum value of the associated numeric grade scale. • Select **Max** to use the maximum value of the associated numeric grade scale. • Select **Custom**, and then enter a custom value in the field provided. This setting only applies when related to a numeric grade scale.
Is Late	Select the checkbox to automatically assign the Late attribute to the assignment score when using this special code in PowerTeacher Pro.
Is Missing	Select the checkbox to automatically assign the Missing attribute to the assignment score when using this special code in PowerTeacher Pro.
Is Collected	Select the checkbox to automatically assign the Collected attribute to the assignment score when using this special code in PowerTeacher Pro.
Is Absent	Select the checkbox to automatically assign the Absent attribute to the assignment score when using this special code in PowerTeacher Pro.
Action	Click the minus button to remove the grade scale.

7. Click **Save**. The special codes grade scale is created.

How to Edit a Grade Scale

Edits to any grade scales affect the grade scales for all of the schools on your system.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click the **Pencil** icon for the grade scale you want to edit. The Edit Grade Scale: [grade scale] page appears.
4. Edit the information as needed. For field descriptions, see the respective *How to Create a Grade Scale* section above.
5. Click **Save**. The Grade Scales page displays the edited grade scale.

How to Delete a Grade Scale

Deleting a grade scale does not affect grades that have already been assigned. The system uses the default grade scale for any course or section that is no longer associated with a grade scale.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Grade Scales**. The Grade Scales page appears.
3. Click the **Pencil** icon for the grade scale you want to edit. The Edit Grade Scale: [grade scale] page appears.

   Note: You cannot delete the default grade scale.

4. To remove a grade scale item:
   a. In the Grade Scale details table, click the **Minus (-)** icon for the item you want to remove.
   b. Click **Save**. A confirmation message appears.
5. To remove the grade scale:
   a. Click **Delete**.
   b. Click **Confirm Delete**. The Grade Scales page appears.

Import Grade Scales

You can also import additional grade scales into PowerSchool to make them available for teachers to use in PowerTeacher Pro.

For more information, see *Data Import Manager* in the PowerSchool online help, or the *Import/Export User Guide* for PowerSchool 10.x, available on PowerSource.
The Data Import Manager page is accessible via **Start > System > Page and Data Management > Data Import Manager**.

Grade Scales Import

To import grade scales, select **Grade Scales: District List** on the Data Import Manager page.

The following fields are required in the data import file when creating new grade scales via import:

- **ID**
- **GradescaleId**
- **Name**

- **GradescaleType**
- **Grade_Points**
- **CutoffPercentage**
- **Value**
- **NumericMin**
- **NumericMax**
- **NumericCutoff**
- **NuermicValue**
- **CutoffPoints**

The ID field is required when updating existing grade scales via import.

GPA Calculations

Before running a grade-related report, such as a report card, set up the correct parameters to calculate your school's grade point average. Some schools also choose to factor into the GPA calculation the number of times a student takes a course. Since GPAs are calculated on-the-fly, any changes take effect immediately and affect all schools on the server.

For information about setting the calculation methods and attempt types, see the following sections:

- *GPA Calculation Methods*
- *GPA Attempt Types*

For information about other GPA settings, see *How to Set Other GPA Settings*.

GPA Calculation Methods

Create GPA calculation methods to define the formula and criteria for GPA calculations. PowerSchool includes four standard calculation methods: Simple, Simple Percent, Weighted, and Weighted Percent. You can modify the standard methods to meet your needs or create an unlimited number of additional calculation methods.

Any changes or additions to the list of calculation methods affect all schools on your server. To share a method with schools on other servers, export the method as a template. For more information, see *How to Export GPA Calculation Methods*. If you have the proper permissions, you can remove a calculation method using DDA/DDE. For more information, see *Direct Database Export*.

Once GPA is calculated, the GPA code is used to present GPA information on reports, exports, and student pages. This code always starts with *gpa and is followed by optional parameters that include pairs of names and values.

Examples of the GPA code include:

- **~(*gpa)** returns the cumulative weighted GPA for a student for all years at the school
- **~(*gpa method=weighted type=cumulative grade=12 credittypeCORE)** returns a weighted GPA for core classes for the student's senior year

The following table lists the parameters and values. All parameters except for "method" are overridden by any settings in the calculation method. Parameters and values can be included in the code in any sequence.

Parameter	Description	Example
method	Specifies the name of the specific calculation method that should be used when performing this calculation. If omitted, a method called "weighted" will be used.	method=weighted method=simple method=honors
type	Specifies the type of the calculation. Valid options are: • **Cumulative:** Uses values from historical grades only. • **Current:** Uses the current (not stored) grades sent by PowerTeacher. If "current" is specified, the term, grade, and year attributes, if specified, are ignored; only grades from the in-session school year using the store code specified on the Current Grade Display settings page in District Setup will be used. • **Projected:** Uses the historical grades, plus those projected grades as defined in the calculation method.	type=cumulative type=current type=projected

	If omitted, "cumulative" is used.	
term	One or more term abbreviations. Only grades whose store codes match the specified abbreviations will be used in the calculation. Separate multiple terms with commas. If omitted, any store code is permitted. If one or more term abbreviations are specified but no grade or year, only grades from the current school year are used.	term=S1 term=Q1,Q2,Q3
grade	One or more grade levels. Only grades stored at the specified grade levels will be used in the calculation. Separate multiple grade levels with commas. If omitted, the historical grade range for the school is used.	grade=12 grade=7,8,9
year	One or more four-digit school years. Only grades stored during the specified school years will be used in the calculation. Specify the start year of a school year that spans multiple calendar years. For example, use 2003 for the 2003-2004 school year. Separate multiple years with commas. If omitted, all school years are used.	year=1999 year=1998,1999,2000
credittype	One or more credit types. Only grades that match one or more of the specified credit types will be used in the calculation. Separate multiple credit types with commas. If omitted, grades with any credit type, including no credit type, are used.	credittype=English credittype=ENG,SCI,MATH credittype=Core,Electives

scale	The name of the grade scale to use for this calculation. If a particular letter grade is not present in the specified grade scale, that grade will not be included in the calculation. If the name of the grade scale specified is unrecognized, a scale called Default is used. If omitted, the GPA points from the grade itself are used.	scale=Default scale=Standard scale=Honors

How to Add GPA Calculation Methods

Note: When using projected GPA options, most schools will set the last three options as **Projected grades are stored grades from this [specified] term**, **do not add grade if a grade for this course exists in any term**, and **Stored credit hours use the course's potential credit hours**.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Calculation Methods**. The GPA Calculation Methods page appears.
4. Click **New**. The GPA Calculation Method page appears.
5. Use the following table to enter information in the fields:

Field	Description
Method name	Enter the name of the calculation method. This is the name that will be referred to in GPA codes on other pages in PowerSchool. **Note:** The standard methods Weighted and Simple cannot be renamed.
Description	Enter a description of the calculation method. This description appears on the GPA Calculation Methods page.
Formula	Enter the formula for the method used to determine the result of the calculation. The formula closely resembles a formula used on a spreadsheet.

	Formulas can include functions, such as average, round, and sum. Use standard operators, such as **+** (addition) and ***** (multiplication) or use logical operators such as **=** (equal to) and **>** (greater than). For more information, see *Formulas for Calculation Methods*.
Calculation type	Choose an option from the pop-up menu: • **Cumulative:** Uses historical grades in the calculation that match the query options specified. • **Current:** Uses current final grades in the calculation, as determined in the School Setup area. A current calculation type uses the current final grades from PowerTeacher. Terms, grade levels, and school years are ignored with this calculation type. • **Projected:** Uses historical grades and additional grades as defined in the Projected GPA Options area of the GPA Calculation Method page. A projected calculation type uses historical grades that match the query options specified, plus additional grades determined by any Projected GPA Options. If the calculation type is specified, the type parameter of the GPA code is ignored.
Grade scale	To override the GPA points used in the calculation with a single grade scale, choose the grade scale from this pop-up menu. If a specific letter grade is not found in the grade scale, it is not used in the calculation. Ordinarily, the GPA points associated with the stored grade are used in the calculation. Typically, these are the weighted points. A single grade scale may be specified to override these GPA points with the values in the specified grade scale for this calculation. For example, a stored grade A may have 5 GPA points. That same A may only be worth 4 GPA points on the Standard grade scale. Use scales to calculate complex weighted GPAs for class ranking and honor roll applications, while maintaining a standard 4.0 scale to use on transcripts and college applications.

	If a grade scale is specified, the scale parameter of the GPA code is ignored.
Terms	Optionally, specify one or more term abbreviations, such as **Q1** or **S2**, to use in the calculation. Separate multiple values with commas. Only grades whose store code matches one of the term abbreviations will be included in the calculation. If the calculation type is Current, terms are ignored. If terms are specified, the term parameter of the GPA code is ignored.
Grade levels	Optionally, specify one or more grade levels to use in the calculation. Use the numeric grade level, such as **11** for eleventh grade or **0** for kindergarten. Separate multiple values with commas. Only grades recorded when a student was at the specified grade levels will be included in the calculation. Note that only grades that fall within the historical grade levels specified in the school's record in District Setup may be specified. For example, if the historical range for the school is 912, specifying **8** in the GPA code will return zero. Separate multiple grade levels with commas. If omitted, the historical grade range for the school is used. If the calculation type is Current, grade levels are ignored. If grade levels are specified, the grade parameter of the GPA code is ignored.
School years	Optionally, specify one or more four-digit school years to use in the calculation. For example, enter **2003** for the 2003-2004 school year. Separate multiple values with commas. Only grades recorded during the specified school years will be included in the calculation. School years are closely related to grade levels. As such, if the school year specified translates to a student's grade level that is outside the historical range for the school, zero will be returned. For more information, refer to the "Grade levels" field. If the calculation type is Current, school years are ignored. If school years are specified, the year parameter of the GPA code is ignored.

Credit types	Optionally, specify one or more credit types to use in the calculation. Separate multiple values with commas. Only grades whose credit type matches one of the types specified will be included in the calculation. In case of a current GPA, the course's credit type is used. In case of a cumulative GPA, the credit type specified for the stored grade is used if present; otherwise, the course's credit type is used, if found. If an historical grade does not have a credit type or if the calculation type is Current, the course's credit type is used. If credit types are specified, the credittype parameter of the GPA code is ignored.
Only include grades	Select all, none, or a combination of the following checkboxes to narrow the selection of grades used in the calculation: • **That count in GPA:** Includes only historical grades that are specified to be included in the GPA. If the calculation type is Current, only grades from courses and sections that have been flagged to be included in GPA will be included in the calculation. • **That count in class rank:** Includes only historical grades that are specified to be included in the class rank. If the calculation type is Current, only grades from courses and sections that have been flagged to be included in class rank will be included in the calculation. • **That count in honor roll:** Includes only historical grades that are specified to be included in the honor roll. If the calculation type is Current, only grades from courses and sections that have been flagged to be included in honor roll will be included in the calculation. • **With potential credit:** Includes only historical grades that have a potential credit that is not zero. If the calculation type is Current, the potential credit is determined by referring to the corresponding course record. If you deselect all of these checkboxes, all historical grades will be included in the calculation.

Projected grades are	If the calculation type is Projected, choose the type of grades used for projected GPA calculations from this pop-up menu. Projected grades are used to determine grades mid-term, such as when colleges want grades for a twelfth-grade student for admission purposes. • **Current final grades:** Uses current final grades from PowerTeacher, as determined in the School Setup area. • **Stored grades from this term:** Enter the term abbreviation in the blank field.
Do not add grade if	If the calculation type is Projected, choose the term for the grade to use in projected GPA calculations from this pop-up menu: • **A grade for the course exists in any term** • **A grade for the course exists in this term:** Enter the term abbreviation in the blank field. A grade will not be added to the calculation if there already exists an historical grade for the current school year with the same course number for any store code or for the specified store code.
Stored credit hours	If the calculation type is Projected, choose the credit hours option used in projected GPA calculations from this pop-up menu: • **Use actual credit hours** • **Get potential credit from course** If projected grades are historical grades, specify whether to use the actual potential and earned credit stored with the grade or to use the potential credit hours from the corresponding course.

6. Click **Submit**. The GPA Calculation Methods page displays the new method.

How to Edit GPA Calculation Methods

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.

3. Click **Calculation Methods**. The GPA Calculation Methods page appears.
4. Click the name of the calculation method you want to edit. The GPA Calculation Method page appears.
5. Edit the information as needed. For field descriptions, see *How to Add GPA Calculation Methods*.
6. Click **Submit**. The GPA Calculation Methods page displays the edited method.

How to Export GPA Calculation Methods

After you create and save a calculation method, you can export the calculation method for use on another PowerSchool server. The option to export the calculation method is available only for saved methods.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Calculation Methods**. The GPA Calculation Methods page appears.
4. Click the name of the calculation method to be exported. The GPA Calculation Method page appears.
5. Click **Export as template**. Save the file as a PowerSchool Template file (*.pst). You can now share the file with other PowerSchool servers.

Formulas for Calculation Methods

Like a formula in a spreadsheet, create formulas for calculation methods in PowerSchool. Formulas consist of functions and arguments, in most cases. Functions are used to perform operations on values, such as calculating a sum or an average, including a grade point average.

There are five categories of functions:

- **Numeric:** Such as rounded, truncated by specified number of places
- **Logical:** Such as "if," "and," "or"
- **Statistical:** Such as average, max, min, median, product, sum
- **Text:** Such as ASCII characters, uppercase, repeat text by specified number of times
- **GPA functions:** Such as number of grades counted in GPA, course numbers, GPA calculation

Results of GPA functions may be arrays of values, which are in braces and separated by commas. For example, the function gpa_percent() may return the result {95.5,83.2,67.8,92} for a student. When you combine the gpa_percent() function with the statistical function average, the formula average(gpa_percent()) returns the result of 84.625 for those four grades.

Embed functions within each other to return the exact result you want. When appending the Round function to the example above to create the formula round(average(gpa_percent()),2), the result is 84.63. The value 2 in the formula indicates the number of digits to round from the decimal point.

You can also use any standard numeric or text operators in a formula, such as **+** (addition), **-** (subtraction), ***** (multiplication), **/** (division), **** (integer division), **^** (exponentiation), **%** (modulo), and **&** (concatenation). The following comparison operators may be used in logical functions: **<** (less than), **<=** (less than or equal to), **>** (greater than), **>=** (greater than or equal to), **=** (equal to), and **<>** (not equal to). For example, use the formula if((average(gpa_percent()))>90,Outstanding Academic Achievement,) to return the phrase Outstanding Academic Achievement if a student's average percentage for the grades exceeds 90 percent. If not, the formula returns nothing.

For more information about functions, see *Functions*. For a list of functions, see the following sections:

- *Numerical Functions*
- *Logical Functions*
- *Statistical Functions*
- *Text Functions*
- *GPA Functions*

GPA Attempt Types

When calculating a student's GPA, you may want to consider the number of times he or she attempts to take a course. An attempt is a numerical expression to determine the length of the term. The name of the attempt type is the first letter of the term abbreviation, such as Y for year or S for semester. The corresponding number is the numeric expression, using decimals for fragments of the term.

Attempt types are used by the gpa_attempts() function. Attempts for a grade are determined by looking up the first character of the store code or term abbreviation, which is listed with the attempt type. If a match is found, the value specified for the attempt type is returned. If a match is not found, zero is returned as a result of that function. For more information about functions, see *Formulas for Calculation Methods*.

How to Add GPA Attempt Types

If you are using the gpa_attempts() function, set up GPA attempt types to factor the number of times a student takes a course in GPA calculations. Otherwise, it is not necessary to create attempt types.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Attempt Types**. The GPA Attempt Types page appears.
4. Click **New**. The GPA Attempt Type page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the attempt type, which is the first letter of the term abbreviation.
Value	Enter the value of the attempt type.
Description	Enter a description for the attempt type.

6. Click **Submit**. The GPA Attempt Types page displays the new attempt type.

How to Edit GPA Attempt Types

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Attempt Types**. The GPA Attempt Types page appears.
4. Click the name of the attempt type you want to edit. The GPA Attempt Type page appears.
5. Edit the information as needed. For field descriptions, see *How to Add GPA Attempt Types*.
6. Click **Submit**. The GPA Attempt Type page displays the edited attempt type.

How to Delete GPA Attempt Types

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.

3. Click **Attempt Types**. The GPA Attempt Types page appears.
4. Click the name of the attempt type you want to delete. The GPA Attempt Type page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Set Other GPA Settings

Modify other global settings related to GPA calculations, including the number of decimal places used in credit hours and the ability to prevent modifications of grade scales.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **GPA Calculations**. The GPA Settings page appears.
3. Click **Miscellaneous**. The GPA Misc Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Number of decimal places in credit hours	Enter the number of places from the decimal point to display for the credit hours.

5. Click **Submit**. The Changes Recorded page appears.

Functions

Formulas consist of functions and arguments, in most cases. Functions are used to perform operations on values, such as calculating a sum or an average, including a grade point average (GPA).

There are five categories of functions:

- Numerical functions: Such as rounded, truncated by specified number of places
- Logical functions: Such as "if," "and," "or"
- Statistical functions: Such as average, max, min, median, product, sum
- Text functions: Such as ASCII characters, uppercase, repeat text by specified number of times
- GPA functions: Such as number of grades counted in GPA, course numbers, GPA calculation

Functions must always include the parentheses, even if no arguments are specified. When specifying arguments to functions, be sure to enclose text values in quotation marks.

GPA Samples

Sample GPA formulas are listed below to illustrate the options available.

PowerSchool's traditional cumulative weighted GPA, rounded to 3 decimal places:

```
round((gpa_sum(gpa_gpapoints()*gpa_potentialcredit()/sum(gpa_potentialcre
dit()),3)
```

PowerSchool's traditional cumulative simple GPA, truncated to 2 decimal places:

```
trunc((average(gpa_gpapoints()),2)
```

A value added GPA:

```
average(gpa_gpapoints())+sum(gpa_addedvalue())
```

The number of A grades received:

```
countof(A,gpa_grade())+countof(A+,gpa_grade())+countof(A-,gpa_grade())
```

Total of all earned credit:

```
sum(gpa_earnedcredit())
```

The text "You are a star student!" if the student received more than 3 A+ grades:

```
if(countof(A+,gpa_grade())>=3,You are a star student!,)
```

The list of all letter grades, GPA points, and potential credit values used by the calculation:

```
gpa_grade()&&gpa_gpapoints()&&gpa_potentialcredit()
```

The result of one GPA calculation if the student has any grades with added value, or the result of another if not:

```
if(sum(gpa_addedvalue())>0,gpa_calculation(honors),gpa_calculation(standar
d))
```

Numerical Functions

Functions are used to perform operations on values, such as rounding numbers to a specified number of digits. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
Abs (Absolute Value)	abs(number)	Returns the absolute value of the number. The result is either a positive number or zero.	abs(-4) returns 4 abs(78) returns 78 abs(0) returns 0
Dec (Decimal) or Frac (Fraction)	dec(number)	Returns the decimal (fractional) part of a real number. The result is always positive.	dec(22.575) returns 0.575 dec(-4.12) returns 0.12
Exp (Exponent)	exp(number)	Returns raised to the power of the number. The constant e equals 2.718281828459, the base of the natural logarithm.	exp(1) returns 2.71828... exp(0.707) returns 2.02811...
Fact (Factorial)	fact(number)	Returns the factorial of the number, equal to 1*2*3*...*number. If the number is negative, returns the #NUM! error value.	fact(5) returns 120 fact(7) returns 5040
Int (Integer)	int(number)	Rounds the number down to the nearest integer. If the number is positive, returns the integer equal to or less than the number. If the number is negative, rounds down to the next lowest whole number.	int(5.76) returns 5 int(-42.123) returns -43

Ln (Natural Log)	ln(number)	Returns the natural logarithm of the number. If the number is negative, returns the #NUM! error value.	round(ln(2.71828),3) returns 1 ln(4) returns 1.3863...
Log2 (Log to Base 2)	log2(number)	Returns the logarithm of the number to base 2. If the number is negative, returns the #NUM! error value.	log2(43) returns 5.4263...
Log10 (Log to Base 10)	log10(number)	Returns the logarithm of the number to base 10. This is the inverse of the number E in scientific notation. If the number is negative, returns the #NUM! error value.	log10(100000) returns 5
Log	log(number{,base})	Returns the logarithm of the number to a base. If the base is omitted, uses 10. If the number or base is negative, returns the #NUM! error value.	log(10000) returns 4 log(10000,6) returns 5.1404...
Mod (Modulo)	mod(number,divisor)	Returns the remainder when the number is divided by the divisor. The result has the same sign as the value of the number being divided. If the number or divisor is a real number, it will be rounded before calculating the modulo.	mod(5,-2) returns 1 mod(23,7) returns 2

Pi	pi()	Returns pi, the ratio of a circle's circumference to its diameter.	pi() returns 3.141592653589793116
Power	power(number,power)	Returns the result of the number raised to a power.	power(2,8) returns 256 power(14,0.5) returns 3.7417...
Rand (Random)	rand({number})	Returns a random number between 0 and the number. If the number is omitted, the returned value is between 0 and 1.	rand() returns 0.8462... rand(50) returns 31.4896...
Round	round(number,digits)	Returns a number rounded to the specified number of digits from the decimal point. If digits is positive, it specifies the number of digits to the right of the decimal point. If negative, it specifies the number of digits to the left of the decimal point.	round(59.72893,3) returns 59.729 round(115925.45,-3) returns 116000
Sign	sign(number)	Returns 1 when the number is positive, -1 when it is negative, and 0 when it is zero.	sign(42) returns 1 sign(-827.32) returns -1 sign(0) returns 0
Sqrt (Square Root)	sqrt(number)	Returns the positive square root of the number. If the number is negative, returns the #NUM! error value.	sqrt(25) returns 5 sqrt(86) returns 9.2736...

Trunc (Truncate)	trunc(number{,digits})	Truncates the number by removing the decimal (fractional) part of the number. If digits is specified, it specifies the precision (number of decimal places) to truncate.	trunc(548.14687) returns 548 trunc(3.4583,2) returns 3.45

Logical Functions

Functions are used to perform operations on values, such as returning a specified number if certain conditions are met. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
And	and(logical1{,logical2,...})	Returns 1 if all of the arguments are true (not zero), or 0 if any argument is false (zero).	and(1,0,1,43) returns 0 and((5=5),1) returns 1
If	if(logical,true_value,false_value)	Returns the true_value if the logical argument is true (not zero), or the false_value if the logical	if(1,100,0) returns 100 if(gpa_count()>20,Lots,Few) returns Few

		argument is false (zero).	
IsBlank	isblank(text)	Returns 1 if the text is blank or 0 if it is a number or contains text.	isblank(83.2) returns 0 isblank(test) returns 0 isblank() returns 1
IsEven	iseven(number)	Returns 1 if the number is zero or evenly divisible by 2, or 0 if it is not.	iseven(42) returns 1 iseven(-17) returns 0
IsLogical	islogical(value)	Returns 1 if the argument can be interpreted as a logical value (0 or 1), or 0 if it cannot.	islogical(0) returns 1 islogical(gpa) returns 0
IsNumber	isnumber(value)	Returns 1 if the argument is a number, or 0 if it is text.	isnumber(3.412) returns 1 isnumber(A+) returns 0
IsOdd	isodd(number)	Returns 1 if the number is not zero or evenly divisible by 2, or 0 if it is.	isodd(42) returns 0 isodd(-17) returns 1

IsText	istext(value)	Returns 1 if the argument is text, or 0 if it is a number.	istext(0) returns 0 istext(gpa) returns 1
Not	not(logical)	Reverses the logic of the logical value: Returns 1 if logical is false (zero), or 0 if logical is true (not zero).	not(1) returns 0 not(5=4) returns 1
Or	or(logical1{,logical2,...})	Returns 1 if any of the arguments are true (not zero), or 0 if all are false (zero).	or(0,0,1,0) returns 1 or((5=4),0) returns 0

Statistical Functions

Functions are used to perform operations on values, such as calculating a sum or an average. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	**Function**	**Description**	**Examples**
Average or Avg or Mean	average(number1{,number2, ...})	Returns the average (arithmetic	average(12,18,25,15) returns 17.5

		mean) of the numeric arguments. The arguments may be individual numbers or results of functions that return arrays of numbers.	average(gpa_percent()) returns 80.5
Count	count(value1{,value2, ...})	Returns the number of arguments given. The arguments may be individual values or results of functions that return arrays of values.	count(12,18,25,15) returns 4 count(gpa_percent()) returns 5
CountOf	countof(search_value,value1{,value2, ...})	Returns the number of occurrences of search_value in the remaining arguments. The arguments may be individual values or results of functions that	countof(3.5,4,3.75,3.5,3,3,4,3,2,3.5,2.5,3) returns 2 countof(A,gpa_grade()) returns 1

		return arrays of values.	
Distinct	distinct(value1{,value2, ...})	Returns an array of the unique values found in the arguments. The arguments may be individual values or results of functions that return arrays of values.	distinct(4,3.75,3.5,3,3, 4,3,2,3.5,2.5,3) returns {4,3.75,3.5,3,2,2.5} distinct(gpa_grade()) returns {A,B+,B,C+,F}
Geomean (Geometric Mean)	geomean(number1 {,number2, ...})	Returns the geometric mean of the positive numeric arguments. The arguments may be individual numbers or results of functions that return arrays of numbers. If any argument is negative, returns the #NUM! error value.	geomean(12,18,25,15) returns 16.8702 ... geomean(gpa_percent()) returns 79.0972 ...

Harmean (Harmonic Mean)	harmean(number1 {,number2, ...})	Returns the harmonic mean of the positive numeric arguments, the reciprocal of the arithmetic mean of reciprocals. The arguments may be individual numbers or results of functions that return arrays of numbers. If any argument is negative, returns the #NUM! error value.	harmean(12,18,25,15) returns 16.2896 ... harmean(gpa_percent()) returns 77.5126 ...
Max (Maximum)	max(number1 {,number2, ...})	Returns the largest number in the list of arguments. The arguments may be individual numbers or results of functions that return arrays of numbers.	max(12,18,25,15) returns 25 max(gpa_percent()) returns 96.2

Maxa (Maximum Alphabetic)	maxa(value1 {,value2, ...})	Sorts the arguments alphabetically, then returns the last value. The arguments may be individual values or results of functions that return arrays of values.	maxa(red,white,blue,green) returns white
Median	median(number1 {,number1, ...})	Returns the median of the numeric arguments. The median is the number in the middle; half of the numbers are greater than the median, half are less. If there is an even number of arguments, returns the average of the two numbers in the middle.	median(1,2,3,4,5) returns 3 median(1,2,3,4,5,6) returns 3.5 median(gpa_gpapoints()) returns 3.333
Min (Minimum)	min(number1 {,number2, ...})	Returns the smallest number in the list of arguments.	min(12,18,25,15) returns 12 min(gpa_percent()) returns 54.8

		The arguments may be individual numbers or results of functions that return arrays of numbers.	
Min (Minimum Alphabetic)	mina(value1 {,value2, ...})	Sorts the arguments alphabetically, then returns the first value. The arguments may be individual values or results of functions that return arrays of values.	mina(red,white,blue,green) returns blue
Mode	mode(value1 {,value2, ...})	Returns the mode of the arguments. The mode is the most frequently occurring, or repetitive, value. If no value repeats, returns #N/A. In the case of a uniform distribution, or multiple	mode(12,18,25,15) returns #N/A mode(12,18,25,15,19, 14,18,9,16,20) returns 18 mode(gpa_gpagrade()) returns B

		modes, returns only one value. The arguments may be individual values or results of functions that return arrays of values.	
Product	product(number1 {,number2, ...})	Multiplies all the numeric arguments and returns the result. The arguments may be individual numbers or results of functions that return arrays of numbers.	product(12,18,25,15) returns 8100
Range	range(number1 {,number2, ...})	Returns the difference between the largest and smallest numeric arguments. The arguments may be individual numbers or results of functions that	range(12,18,25,15) returns 13 range(gpa_gpapoints()) returns 4

		return arrays of numbers.	
Stdev (Standard Deviation)	stdev(number1,number2 {,number3, ...})	Calculates the standard deviation of a population based on a sample given as a list of arguments using the nonbiased or n-1 method. A standard deviation is a measure of how widely values are dispersed from the average value (arithmetic mean). The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents the entire population, use Stdevp.	stdev(12,18,25,15) returns 5.56778 ... stdev(gpa_percent()) returns 15.6962 ...

Stdevp (Standard Deviation Population)	stdev(number1,number2 {,number3, ...})	Calculates the standard deviation of an entire population given as a list of arguments using the biased or n method. A standard deviation is a measure of how widely values are dispersed from the average value (arithmetic mean). The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents a sample of the population, use Stdev.	stdev(12,18,25,15) returns 4.8218 ... stdev(gpa_percent()) returns 14.0391 ...
Sum	sum(number1 {,number2, ...})	Adds all the numeric arguments and returns the result. The arguments	sum(12,18,25,15) returns 70 sum(gpa_potentialcredit()) returns 4

		may be individual numbers or results of functions that return arrays of numbers.	
Var (Variance)	var(number1,number2 [,number3, ...})	Returns the variance of a population based on a sample given as a list of arguments. The arguments may be individual numbers or results of functions that return arrays of numbers. If your data represents the entire population, use Varp.	var(12,18,25,15) returns 31 var(gpa_gpapoints()) returns 2.5138 ...
Varp (Variance Population)	var(number1,number2 {,number3, ...})	Returns the variance of an entire population given as a list of arguments. The arguments may be individual	varp(12,18,25,15) returns 23.25 varp(gpa_gpapoints()) returns 2.0110 ...

		numbers or results of functions that return arrays of numbers. If your data represents a sample of the population, use Var.	

Text Functions

Functions are used to perform operations on values, such as joining two strings of text together. The functions in this category are listed alphabetically.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples
Char (Character)	char(number)	Returns the ASCII character corresponding to the number. The ASCII set used is the Macintosh extended ASCII set.	char(65) returns A char(92) returns \
Code (ASCII Code)	code(text)	Returns the numeric ASCII	code(A) returns 65 code(gpa is fun) returns 103

		code of the first character in the text. The ASCII set used is the Macintosh extended ASCII set.	
Concatenate or Concat	concatenate(text1{,text2,...})	Joins several strings of text into one string of text.	concatenate(gpa,is,fun) returns gpaisfun concatenate(gpa_count(),,grades) returns 29 grades
Exact	exact(text1,text2)	Returns 1 if both arguments are identical in case and characters, or 0 if different.	exact(GPA,gpa) returns 0 exact(Mr. Smith,Mr. Smith) returns 1
Left	left(text{,num_characters})	Returns the first (leftmost) character or characters in the text. If num_characters is omitted, returns 1 character.	left(GPA) returns G left(Mr. Smith,3) returns Mr.
Len (Length)	len(text)	Returns the number of characters in the text, including spaces, numbers, and	len(GPA) returns 3 len(Mr. Smith) returns 8

		special characters.	
Lower	lower(text)	Converts any uppercase characters in the text to lowercase.	lower(GPA) returns gpa lower(Mr. Smith) returns mr. smith
Mid (Middle)	mid(text,start_position, num_characters)	Returns a specific number of characters from the text starting at the position you specify.	mid(GPA,1,1) returns P mid(Mr. Smith,3,4) returns . Smi
Proper	proper(text)	Capitalizes the first letter and any letter following a non-letter in the text.	proper(GPA) returns Gpa proper(2-cent's worth) returns 2-Cent'S Worth
Replace	replace(text,start_positio n, num_characters,new_text)	Replaces num_characte rs characters of text with the new_text starting at the position you specify.	replace(gpa codes,4,5,is fun) returns gpa is fun replace(Mr. Smith,1,3,Mrs.) returns Mrs. Smith
Rept (Repeat)	rept(text,number_times)	Repeats the text the specified	rept(gpa is fun ,5) returns gpa is fun gpa is fun gpa is fun gpa is fun gpa is fun

		number of times.	rept(-,average(gpa_gpapoints())*4) returns -----------
Right	right(text{,num_characters})	Returns the last (rightmost) characters in the text. If num_characters is omitted, returns 1 character.	right(GPA) returns A right(Mr. Smith,4) returns mith
Trim	trim(text)	Removes leading, trailing, and extra spaces from the text.	trim(gpa is fun) returns gpa is fun
Upper	upper(text)	Converts any lowercase characters in the text to uppercase.	upper(gpa is fun) returns GPA IS FUN upper(Mr. Smith) returns MR. SMITH

GPA Functions

Functions are used to perform operations on values, such as returning the number of grades used to determine a student's GPA. The functions in this category are listed alphabetically. For more information about GPA functions, see PowerSource.

Most functions have at least one required argument, though some do not accept any arguments. Optional arguments are surrounded by braces { }. A brief description and one or more examples follow each function.

Function name or alternate function	Function	Description	Examples

GPA_AddedValue	gpa_addedvalue()	Returns a numeric array listing the added value for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_addedvalue() returns {0,0.02,0,0,0}
GPA_Attempts	gpa_attempts()	Returns a numeric array listing the attempts for each grade used in the GPA calculation. The attempts are determined by comparing the first character of the store code to a lookup table defined in District Setup. If the character is not found in the lookup table, a zero is used. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_attempts() returns {1,1,2,2,2}
GPA_Calculation	gpa_calculation(text)	Returns the result of the GPA calculation method whose name is specified.	gpa_calculation(weighted) returns 3.254

GPA_Concat	gpa_concat(formula)	Evaluates the formula once for every grade used in the GPA calculation and returns a concatenated string of the results. When used inside gpa_concat(), the following functions return an individual value instead of an array: • gpa_addedvalue() • gpa_attempts() • gpa_coursenumber() • gpa_earnedcredit() • gpa_gpapoints() • gpa_grade() • gpa_gradelevel() • gpa_percent() • gpa_potentialcredit() • gpa_storecode() • gpa_termid() **Note:** A gpa_concat() or gpa_sum() function cannot be used within the formula.	gpa_concat(if(left(gpa_grade())=B,*,)) returns **

GPA_Count	gpa_count()	Returns the number of grades used in the GPA calculation. Functionally equivalent to count(gpa_grade()), but faster.	gpa_count() returns 8
GPA_CountSchoolYears	gpa_countschoolyears()	Returns the number of unique school years (not grade levels) for the grades used in the GPA calculation.	gpa_countschoolyears() returns 2
GPA_CountUniqueCourses	gpa_countuniquecourses()	Returns the number of unique courses (based on course number) for the grades used in the GPA calculation.	gpa_countuniquecourses() returns 6
GPA_CountYearTerms	gpa_countyearterms()	Counts the number of unique store codes in each school year, then returns a grand total.	gpa_countyearterms() returns 4
GPA_CourseNumber	gpa_coursenumber()	Returns a text array listing the course numbers for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_coursenumber() returns {MA1001,SC2001, FA540,LS105, PE200}

GPA_EarnedCredit	gpa_earnedcredit()	Returns a numeric array listing the earned credit hours for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_earnedcredit() returns {0,0.5,0.5,1,0}
GPA_GPAPoints	gpa_gpapoints()	Returns a numeric array listing the gpa points for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_gpapoints() returns {4,3.5,3.333,2.5,0}
GPA_Grade	gpa_grade()	Returns a text array listing the letter grade for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_grade() returns {A,B+,B,C+,F}
GPA_GradeLevel	gpa_gradelevel()	Returns a numeric array listing the grade level for each grade used in the GPA calculation. If	gpa_gradelevel() returns {9,9,9,10,10}

		used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	
GPA_Percent	gpa_percent()	Returns a numeric array listing the percentage for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_percent() returns {96.2,88.5,84,79,54.8}
GPA_PotentialCredit	gpa_potentialcredit()	Returns a numeric array listing the potential credit hours for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_potentialcredit() returns {0,0.5,0.5,1,1}
GPA_StoreCode	gpa_storecode()	Returns a text array listing the store code for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_storecode() returns {Q1,Q2,S1,S1,S2}

GPA_Sum	gpa_sum(formula)	Evaluates the formula once for every grade used in the GPA calculation and returns the numeric total of the results. When used inside gpa_concat(), the following functions return an individual value instead of an array: • gpa_addedvalue() • gpa_attempts() • gpa_coursenumber() • gpa_earnedcredit() • gpa_gpapoints() • gpa_grade() • gpa_gradelevel() • gpa_percent() • gpa_potentialcredit() • gpa_storecode() • gpa_termid() **Note:** A gpa_concat() or gpa_sum() function cannot be used within the formula.	gpa_sum(gpa_gpapoints() *gpa_potentialcredit()) returns 5.9165

GPA_TermID	gpa_termid()	Returns a numeric array listing the term ID for each grade used in the GPA calculation. If used within gpa_concat() or gpa_sum(), returns a single value. See the note in gpa_sum().	gpa_termid() returns {1004,1005,1001, 1101,1102}

GPA Student Screens

Use the GPA Student Screens function to determine what appears on GPA-related student pages, including the Quick Lookup page and the Cumulative Information page.

How to Define GPA Settings for Quick Lookup Page

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **GPA Student Screens.** The GPA Options - Student Screens page appears.
3. Choose the type of current GPA to display under schedule from the pop-up menu:
    - **Weighted**: If your school calculates weighted GPAs, the system also includes the number of credit hours students earn in each course in the GPA calculation.
    - **Weighted Percent**
    - **Simple**: If your school calculates simple GPAs, only the students' grades are involved in the calculation, and the credit hours of each course are not referenced.
    - **Simple Percent**
    - **Total Earned Credit**
4. Click **Submit**. The GPA Options - Student Screens page displays the changed Quick Lookup option.

How to Define GPA Settings for Cumulative Info Page

For the Cumulative Info student page, you can define the rows of information that appear for each student.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **GPA Student Screens**. The GPA Options - Student Screens page appears.
3. Enter in the first Row Title field the name of the first row to appear on the Cumulative Info page. The name should clearly indicate the information the user is viewing, such as Cumulative GPA (Weighted).
4. Use the following tables to determine the information you want to display in the Data column.

   For Cumulative GPAs:

Field Expression	Code	Notes
Cumulative GPA (weighted)	^(*gpa)	The cumulative GPA for the student.
Cumulative GPA (simple)	^(*gpa.simple)	Same as Cumulative GPA (weighted), except uses the simple calculation method rather than weighted.
Cumulative credit hours earned	^(*credit_hours)	Includes all courses from the Historical Grades page.
Class rank (based on cumulative weighted GPA)	^(*class_rank_out_of;gpa)	Use any valid GPA type as the GPA parameter, such as gpa.simple and gpa.percent.
Cumulative avg. % earned in all classes (weighted)	^(*gpa.percent)	See Cumulative Percentage GPA.
Cumulative avg. % earned in all classes (simple)	^(*gpa.percent.simple)	See Cumulative Simple Percentage GPA.

For GPAs for specific years and terms:

Field Expression	Code	Notes
GPA for Quarter 1 (weighted)	^(*gpa;Q1)	Calculates the GPA for Q1 of the current school year, such as the year in which the user is currently working. Q1's grades must have already been stored.
GPA for the student's entire junior year	^(*gpa;11)	Calculates the GPA for grade 11.
GPA for Q1 of the student's junior year	^(*gpa;11;Q1)	Calculates the GPA for Q1 of grade 11 for the current student. **Note:** The sequence of the parameters Q1 and 11 is not significant; ^(*gpa;Q1;11) returns the same number as ^(*gpa;11;Q1).
GPA for the year 2004	^(*gpa;2004)	Calculates the GPA for 2004 for the current student.
GPA for Quarter 3 (simple)	^(*gpa.simple;Q3)	Same as GPA for the year 2004 but using the simple calculation method. You can use percent instead of simple if you want the percent GPA.

For Current GPAs:

Field Expression	Code	Notes
The current GPA (simple)	^(*gpa.current)	From the grades on the Quick Lookup page, such as those current as of today. **Note:** Current grades are always calculated using the simple method.

The average % being earned in the current classes (simple)	^(*gpa.current.percent)	From the grades on the Quick Lookup page, such as those current as of today.

For Weighted GPAs by Credit Type:

Field Expression	Code	Notes
Weighted GPA by Credit Type	^(*gpa.credit_type.ENG)	Weighted GPA for grades for the current student in the current year that are of the credit type ENG. To calculate all historical grades, see the Weighted GPA by Credit Type by Grade field expression.
Weighted GPA by Credit Type by Grade	^(*gpa.credit_type.ENG;12)	Same as Weighted GPA by Credit Type, but also includes grade 12. For all historical grades, enter each grade and separate each grade with commas, such as ***gpa.credit_type.ENG;9,10,11,12**.

For Class Ranking by GPA:

Class ranking codes always begin with *classrank and may be followed by zero to three optional parameters:

- Parameter "method" - Specifies the name of the class rank method for which a rank should be returned. Class rank calculation methods are defined by the user in the Class Rankings section of School Setup.
- Parameter "result" - Specifies the type of data to return as the result. Possible values are "rank", "outof", "rankoutof", "percentile", "rankdate", "gpa", and "schoolname". If omitted, the default value is "rank".
- Parameter "percentiledigits" - If the parameter "result" is "percentile", this parameter specifies the number of decimal places to compute the percentage. If omitted, "2" is the default.

Field Expression	Code	Notes

Class rank, weighted (default)	^(*classrank) or ^(*classrank method="weighted")	Numerical class rank based on cumulative weighted GPA for the student's entire academic career for this school.
Class rank, user defined	^(*classrank method="UserDefined")	Class rank based on a user-defined GPA calculation method as specified in Class Rankings in School Setup.
Class rank, rank result	^(*classrank) or ^(*classrank result="rank")	Numerical class rank based on cumulative weighted GPA for the student's entire academic career for this school.
Class rank, outof result	^(*classrank result="outof")	Number of students ranked.
Class rank, rankoutof result	^(*classrank result="rankoutof")	Rank for the student, the text "out of", and the number of students ranked.
Class rank, percentile result	^(*classrank result="percentile")	Student rank percentile to the number of places specified by the percentiledigits parameter.
Class rank, rankdate result	^(*classrank result="rankdate")	Date the rank was last updated.
Class rank, gpa result	^(*classrank result="gpa")	Result of the GPA code used to determine the class rank.
Class rank, schoolname result	^(*classrank result="schoolname")	Name of the school where the student earned the rank.
Class rank, percentiledigits	^(*classrank result="percentile" percentiledigits="3")	When used with the percentile result, specifies the number of decimal places to compute the percentage.

5. Click **Submit**. The GPA Options - Student Screens page displays the new settings.

Honor Roll Administration

The ability to calculate your honor roll based on grading, behavior, or attendance information is important to a school. Every school has its own way of calculating or determining who is on the honor roll and who is eligible for extracurricular activities.

First, define the various honor roll lists used by a school or district. Within those lists, set up the different honor levels that may be attained and the criteria for meeting each level. Once the setup is complete, the PowerSchool administrator should run the calculation function periodically throughout the school year. The results of the calculation are stored in a separate table in the database. These results can be viewed as a summary for a single student, a group report, or as individual components of a custom page, export, or custom report using report codes.

Honor Roll Methods

Honor roll methods define the various honor roll lists used by a school or district. You can create as many different honor roll methods as needed. Honor roll methods can be school-specific or shared among all schools on a server.

Honor Roll Levels

Every honor roll method will contain one or more honor roll levels. The evaluation order of honor roll levels is significant. Typically, the highest honor with the most stringent criteria is evaluated first. If a student does not meet the criteria for that level, the criteria for the next highest honor will be evaluated, and so on. If a student meets the criteria for an honor roll level, a record of that honor is created and the remaining levels are skipped.

The evaluation of the criteria within each honor roll level is cumulative, meaning a student must meet all of the specified options to receive that honor. You can create as many different honor roll levels as needed.

Honor Roll Calculations

Once the honor roll methods and levels have been set up, you can calculate an honor roll at any time.

How to Create an Honor Roll Method

Note: Honor rolls that use a GPA Calculation Type of Current (Start Page > District Setup > GPA Calculations > Calculation Methods > New > Calculation Type = Current) must have a term set up that matches the Final Grade setup. For example, if an Honor Roll for the Q1

Final Grade is used, not only is a Q1 Final Grade needed, but a Q1 term setup in years and terms is also needed.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click **New**. The Honor Roll Method page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name	Enter the name of the honor roll method. This is the name that will be referred to in honor roll report codes and on other menu pages.
Description	Enter a description of the honor roll method.
Can be used by	Specifies whether the honor roll method can be used by all schools on the server, or only the current school. Do one of the following: • Select the current school option. • Select the all schools option.

5. Click **Submit**. The Honor Roll Methods page displays the new honor roll method.
6. Click **Levels** next to the method you just created. The Honor Roll Levels page appears.
7. Click **New**. The Honor Roll Level detail page appears.
8. Use the following table to enter general information:

Type	Description
Name	Enter the name of the honor roll level. This is the level name that appears on report pages and is the default value returned by the honor roll report code. This name does not need be unique, allowing you to define multiple sets of criteria for a given level.

Description	Enter a description of the honor roll level.
Evaluation Order	Enter a value specifying the order in which the various honor roll levels will be evaluated. Lower numbers are evaluated first.
Message	Enter the text message you want to appear on report cards and transcripts. **Note:** The message should be longer than the level name.

9. Use the following table to enter GPA options:

Type	Description
GPA Calculation Method	Choose the GPA calculation method to use when evaluating this honor roll level from the pop-up menu. The GPA calculation method is used for two things: determining a GPA value that may be compared against a specified cutoff value and building a list of letter grades that will be used in the Grade Options settings described below. Every honor roll level must specify a GPA calculation method.
GPA result is	Since GPA calculation methods can return alphanumeric results, choose whether the comparison should be numeric or text from the pop-up menu.
Comparison	Choose the comparator to use when comparing the result of the GPA calculation from the pop-up menu. Enter the cutoff value in the provided field. If you do not want to compare the value of the GPA calculation, leave the cutoff value field blank.
Only include grades	If selected, the checkbox setting allows you to override the settings used in the GPA calculation method so that any grades that have been flagged to be excluded from honor roll are not used in the calculation or returned in the list of grades for the grade options. Do one of the following:

	• Select the checkbox to allow you to override the settings used in the GPA calculation method. • Deselect the checkbox to not allow you to override the settings used in the GPA calculation method.

10. Use the following table to enter credit options information:

Type	**Description**
Potential Credit	Use the pop-up menu to choose the comparator to use when comparing the total of the potential credit hours from the list of grades returned by the GPA calculation. Enter the cutoff value in the provided field. If you do not want to compare the value of the potential credit hours, leave the cutoff value field blank.
Earned Credit	Use the pop-up menu to choose the comparator to use when comparing the total of the earned credit hours from the list of grades returned by the GPA calculation. Enter the cutoff value in the provided field. If you do not want to compare the value of the earned credit hours, leave the cutoff value field blank.
Number of unique courses	Use the pop-up menu to choose the comparator to use when comparing the number of unique course numbers found in the list of grades returned by the GPA calculation. Enter the cutoff value in the provided field. If you do not want to compare the number of unique course numbers, leave the cutoff value field blank.

11. Use the following table to enter grade options information:

Type	**Description**
Student must have	These four groups of grade options allow you to do comparisons on the list of letter grades returned by the GPA calculation. Choose a comparison from the pop-up menu:

	• **At least**: There must be at least <the specified number> of any of the grades below in the list of grades returned by the GPA calculation • **No more than**: There cannot be any more than <the specified number> of any of the grades below in the list of grades returned by the GPA calculation • **Exactly**: There must be no more than and no less than <the specified number> of any of the grades below in the list of grades returned by the GPA calculation • **None**: There cannot be any of the grades below in the list of grades returned by the GPA calculation • **Only**: There must be only the grades below in the list of grades returned by the GPA calculation.
Of the grades	Enter a comma-separated list of letter grades to use with the "Student must have" comparison. If you do not want to compare letter grades in one or more of the grade options, leave this field blank.
And	Choose additional comparisons from the pop-up menu. For each additional comparison, enter the "Students must have" and "Of these grades" information.

12. Click **Submit**. The Honor Roll Methods page displays the new honor roll level.
13. Repeat steps 7 through 12 for each level you want to create.
14. Verify the evaluation order.
15. Click **Submit**. The Honor Roll Methods page appears.

How to Edit an Honor Roll Method

Note: Honor rolls that use a GPA Calculation Type of Current (Start Page > District Setup > GPA Calculations > Calculation Methods > New > Calculation Type = Current) must have a term set up that matches the Final Grade setup. For example, if an Honor Roll for the Q1 Final Grade is used, not only is a Q1 Final Grade needed, but a Q1 term setup in years and terms is also needed.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.

3. Click the method you want to edit. The Honor Roll Method page appears.
4. Edit the information as needed. For field descriptions, see *How to Create an Honor Roll Method*.
5. Click **Submit**. The Honor Roll Methods page displays the edited honor roll method.

How to Delete an Honor Roll Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the method you want to delete. The Honor Roll Method page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Edit Honor Roll Levels

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the levels of the honor roll you want to edit. The Honor Roll Level page appears.
4. Click the level you want to edit. The Honor Roll Levels detail page appears.
5. Edit the information as needed. For field descriptions, see *How to Create an Honor Roll Method*.
6. Click **Submit**. The Honor Roll Levels detail page reappears.

How to Delete Honor Roll Levels

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Honor Roll**. The Honor Roll Methods page appears.
3. Click the levels of the honor roll you want to edit. The Honor Roll Level page appears.
4. Click the level you want to delete. The Honor Roll Levels detail page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Calculate the Honor Roll

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Grades, click **Calculate Honor Roll**. The Calculate Honor Roll page appears.
3. Use the following table to enter information in the fields:

Type	Description
Which Students	Indicate which students for whom you want to calculate honor roll by selecting one of the following options: • Select the **[Student name]** option to calculate honor roll for a single student. This option is useful for testing. • Select **The selected [x] students** option to calculate honor roll for the current selection of students. This selection is useful when calculating honor roll for a specific group of students, such as all current seniors. • Select the **All [x] currently enrolled students** option to calculate honor roll for all enrolled students in the selected school.
Store Code	Indicates the new store code to use when storing the resulting honor roll. Enter a valid store code (a letter followed by a single number). **Note:** Results of the honor roll calculation will be stored using this store code for the current school year.
Honor Roll Method	The method by which you want honor roll calculated. Use the pop-up menu to make your choice. **Note:** Only one honor roll method can be calculated at a time.

4. Click **Submit**. PowerSchool calculates the specified honor roll method for the selected students.

The results of honor roll calculations may be viewed for a single student or for a group of students.

Honor Roll Codes

The honor roll code returns data based on honor roll calculations that are periodically run by the PowerSchool administrator. The honor roll code provides an easy way to access the stored data when working with a single student, such as a custom student page, quick export, or object report.

The basic syntax of the honor roll code is illustrated by the examples below. The code always starts with ***honorroll** and is followed by several parameters (name/value pairs). These parameters are always of the form **name=value**. Certain parameters are required. All other parameters are optional and default values will be used if omitted.

~(*honorroll method=High School term=Q2)
~(*honorroll method=NHS term=S1 year=2002 result=gpa)
~(*honorroll method=Honors term=Q2 grade=11)

The following table lists the parameters, values, and examples for the honor roll code. Parameters and values can be included in the code in any sequence.

Parameter	**Description**	**Example**
method	Specifies the name of the honor roll method to return. These methods are predefined by the user in the Honor Roll section of school setup. The method parameter is required. If omitted, an error message is returned.	method=High School method=NHS
term	A single term abbreviation. Specifies the store code of the appropriate honor roll record. The term parameter is required. If omitted, an error message is returned.	term=S1 term=Q3
grade	A single grade level. For KG, PK, use the numeric code 0, -1, and so forth. Specifies the historical grade level of the appropriate honor roll record. Note that grade and year are often mutually exclusive and the use of both parameters in the code may cause no record to be found. If no grade or year parameter is specified, will find an honor roll record from the current school year.	grade=12 grade=8
year	A single four-digit school year. Remember that school years in PowerSchool are	year=2003 year=2004

	specified using the start year. For example, for the 2003-2004 school year, use 2003. Specifies the school year of the appropriate honor roll record. Note that grade and year are often mutually exclusive and the use of both parameters in the code may cause no record to be found. If no grade or year parameter is specified, will find an honor roll record from the current school year.	
result	The type of data to return as the result. Valid options are level, message, gpa, schoolname, and date. Level means return the name of the honor roll level met. Message means return the text message for the honor roll level. GPA means return the GPA used to determine the honor roll level. Schoolname means return the name of the school where the student earned the honor roll. Date means return the date the honor roll was calculated. If omitted, level is returned. Note that if no honor roll is found that matches the parameters specified, no text will be returned regardless of the result setting.	result=level result=message result=gpa result=schoolname result=date

The following are annotated examples of various honor roll codes.

High school honor roll from Q3 of the student's junior year:
~(*honorroll method=High School term=Q3 grade=11)

The GPA used to determine that honor roll level:
~(*honorroll method=High School term=Q3 grade=11 result=gpa)

The NHS honor roll message from S2 of the current school year:
~(*honorroll method=NHS term=S2 result=message)

The date the Q1 Honors honor roll was calculated for this student in the 2002-2003 school year:
~(*honorroll method=Honors term=Q1 year=2002 result=date)

PowerTeacher Gradebook Final Grades Setup

Use Final Grades Setup to view and set up your school's grading terms and their parameters. Define the dates of each grading term in the school year and assignment names for which teachers enter final grades for that term.

When you store final grades at the end of each term, you store a specific final grade, such as Q1. Before you can store final grades, you must set up final grades in PowerSchool. Ensure that the following steps have been completed so that teachers can use the gradebook to report their students' grades to PowerSchool.

Note: You must set up final grades for each school that shares your PowerSchool server.

Set up final grades one term at a time. When you set up final grades for a term, you affect only the courses that belong to that term. For example, a first semester course belongs only to Semester 1; it does not belong to Quarter 1, Quarter 2, or the entire school year.

After you set up final grades in PowerSchool, the information is automatically sent to each teacher's gradebook.

Note: If you do not define the final grade setup for a grading term, teachers will not be able to enter grades in the gradebook.

For information about setting up final grades entry in PowerTeacher, see *PowerTeacher Final Grade Entry*. The page displays any grading terms already defined for the current school year.

How to Add Final Grades

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Click **New** under the term for which you want to set up final grades. The New Final Grade page appears.
4. Use the following table to enter information in the fields:

Field	Description
School	The selected school name appears.
Name	Enter a name for this final grade, such as **Q3**.
Staring Date	Enter the starting date to indicate the date the term begins using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this

	format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Ending Date	Enter the ending date to indicate the date the term ends using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Suppress Letter Grade Display	Select the checkbox if you do not want to display letter grades in the system and on reports. Only percentage grades appear.
Suppress Percent Display	Select the checkbox if you do not want to display percent grades in the system on reports. Only letter grades appear.
At or Above This Level of Attendance Points	Enter a level of attendance points for the given date range to automatically affect students' grades due to attendance. Otherwise, enter **0** or leave the field blank.
Change a Student's Grade to	Enter the grade that students receive after meeting or exceeding the attendance points indicated in the previous field.
Do not apply the attendance point change to the following grades	**Note**: These fields only appear when editing an existing final grade. To make exclusions to the attendance point change: 1. Click **Add a Gradescale**. The Final Grade Exclusion page appears. 2. Choose a grade scale from the Grade Scale pop-up menu. 3. Click **Submit**. The Edit Final Grade page appears. 4. Click **No Marks Excluded**. The Final Grade Exclusions page appears. 5. Select the **Marks to Exclude** checkboxes that apply. 6. Click **Submit** to save the changes or click **Delete** to remove.

5. Click **Submit**. The Final Grades Setups page displays the new final grade.

How to Edit Final Grades

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Click the term name that you want to edit. The Edit Final Grade page appears.
4. Edit the information as needed. For field descriptions, see *How to Edit Final Grades*.
5. Click **Submit**. The Final Grades Setups page displays the new final grade.

How to Set Options for Presuming Complete

The Options for Presuming Complete field applies to course prerequisite rules and graduation plan progress. Entering value indicates the number of days after the end of enrollment that you want the course prerequisite rule evaluator to presume completion and graduation plans to include the enrollment as in progress. This number allows the administrator some number of days between the end of a term and the storage of grades for that term. A negative number allows specification of the number of days before the day the enrollment ends, for instances where the school typically records grades prior to enrollments ending (rare). For more information, see *Graduation Planner* or the *Graduation Planner User Guide* available on PowerSource.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Enter the appropriate value in the **Days Before/After Term End** field.
4. Click **Submit**. The Final Grade/Reporting Term Setup page displays the new final grade.

How to Delete Final Grades

If you delete final grades between the process of entering final grades and storing grades, you will lose final grade information.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Final Grade/Reporting Term Setup**. The Final Grade/Reporting Term Setup page appears.
3. Click the term name that you want to delete. The Edit Final Grade page appears.
4. Click **Delete**.

5. Click **Confirm Delete**. A warning message appears indicating deleting the reporting term will also delete all final grades, comments, and standards grades related to this reporting term.
6. To delete these records, click **OK**. The Selection Deleted page appears.

Identity

Gender Pronouns

When a student's Gender is set to another value other than Male or Female, you can use this page to set the alternate gender pronouns to be used in PowerSchool. For example, this will be used with Smart Pronouns in PowerTeacher Pro and in Data Access Tags.

How to Define Gender Pronouns

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Identity, click **Gender Pronouns**. The Gender Pronouns page appears.
3. Use the following table to enter information in the fields:

Field	Description
In Place of he/she	Enter the alternate gender pronouns to be used in place of he/she. Otherwise, leave the existing default of ______ on printed documents. Using the line, you can write in the preferred gender pronoun.
In Place of He/She	Enter the alternate gender pronouns to be used in place of He/She. Otherwise, leave the existing default of ______ on printed documents. Using the line, you can write in the preferred gender pronoun.
In Place of Him/Her	Enter the alternate gender pronouns to be used in place of Him/Her. Otherwise, leave the existing default of ______ on printed documents. Using the line, you can write in the preferred gender pronoun.

In Place of his/hers	Enter the alternate gender pronouns to be used in place of his/hers. Otherwise, leave the existing default of ______ on printed documents. Using the line, you can write in the preferred gender pronoun.
In Place of His/Hers	Enter the alternate gender pronouns to be used in place of His/Hers. Otherwise, leave the existing default of ______ on printed documents. Using the line, you can write in the preferred gender pronoun.
In Place of Son/Daughter	Enter the alternate gender pronouns to be used in place of Son/Daughter. Otherwise, leave the existing default of **child**.

4. Click **Submit**. The Changes Recorded page appears.

Other

Configure Global API and SIF Settings

Use this page to configure global settings for SIF and API data change events and throttling.

Data Event API Services

Enabling Data Event API Services allows notifications of data change events between PowerSchool and a third party application.

SIF Agent for PowerSchool

Enabling the SIF Agent for PowerSchool makes it possible to seamlessly interoperate with a third party application with the use of SIF. For more information about the PowerSchool SIF Agent, see PowerSource.

Note: SIF-related fields appear on the School Information page and the Scheduling/Reporting Ethnicity Codes page.

How to Configure Global API and SIF Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.

3. Click **Global Event Services and SIF**. The Global Event Services and SIF page appears.
4. Use the following table to enter information in the fields:

Field	Description
All Off	Choose this option to disable event generation and SIF.
Data Event API Services Only	Choose this option to enable event generation. **Note:** This option is the recommended setting.
Data Event API Services + SIF Agent for PowerSchool	Choose this option to enable event generation and SIF.
Minimum time interval (ms) between API requests per plugin	Enter the window of time (in milliseconds) within which the maximum number of API requests an API plugin can be made to the PowerSchool server. If an API plugin makes more than one API request within this window of time, the request is rejected and an error message is sent indicating too many requests and to wait for a certain number of seconds before making another request. To disable, enter a value of zero or leave blank. **Note:** Any changes to this setting will require a server restart. In a server array environment, each node will need to be restarted.

5. Click **Submit**. The server tools are either active or inactive, depending on your selection.

   Note: The server needs to be restarted if **Minimum time interval (ms) between API requests per plugin** has been updated.

Daily Bulletin Setup

Use this page to set up the daily bulletin for viewing in PowerSchool, the PowerSchool Student and Parent portal, and PowerTeacher. In addition, you can modify the format of the daily bulletin, preview it, and view all bulletin items, including those that have expired.

How to Add a Daily Bulletin Item

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.
3. Click **New**. The New Daily Bulletin Item page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Date Range	Enter the dates on which you want this item to appear using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Target Audience	Use the pop-up menu to choose the audience of the bulletin item, identified by the user's permissions: • **Public:** Everyone can view this bulletin item, including those using the URL [your school]/bulletin/[your school number].html. • **Teachers:** Only those with permission to PowerTeacher and the PowerSchool Admin Web pages can view this bulletin item. • **Admin:** Only those with permission to the PowerSchool Admin Web pages can view this bulletin item.
Sort Order	Enter a number to determine the order in which you want the system to display this item relative to other items. The lower the sort order number, the higher the item appears on the daily bulletin. **Note:** You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the first one created precedes the other. The audience does not affect the sort order.
Item Title Start	Enter the start tags for your title to determine how your title will look. Recommended value: <div class="bulletin"><h3>

Item Title End	If you do not want the body text to look the same as the title text, enter the end tags for your title text. Recommended value: </h3>
Item Body Start	Enter the start tags for your body text to determine how your body text will look. Recommended value: <div class="bulletin-body">
Item Body End	Enter the end tags for your body text. Recommended value: </div></div>

5. Click **Submit**. The Daily Bulletin Setup page displays the new bulletin item.

How to Change Bulletin Formats

Change the font, font size, and color of daily bulletin items. Modifications on this page require basic knowledge of Hypertext Markup Language (HTML).

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.
3. Click **Bulletin HTML formatting preferences**. The Bulletin HTML Formatting Preferences page appears.
4. Use the following table to enter information in the fields:

Field	Description
Item Title Start	Enter the start tags for your title to determine how your title will look.
Item Title End	If you do not want the body text to look the same as the title text, enter the end tags for your title text.
Item Body Start	Enter the start tags for your body text to determine how your body text will look.
Item Body End	Enter the end tags for your body text.

5. Click **Submit**. The Daily Bulletin Setup page appears.

How to Preview the Daily Bulletin

Though it is possible to view the daily bulletin in PowerSchool, the PowerSchool Student and Parent portal, and PowerTeacher, you can preview the bulletin items for a particular day from the Special Functions page.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.
3. Click **Preview Bulletin**. The Daily Bulletin page appears.
4. Click the dates to navigate to different pages of the bulletin.

How to View All Bulletin Items

Though it is possible to view the daily bulletin in PowerSchool, the PowerSchool Student and Parent portal, and PowerTeacher, view all of the bulletin items, including expired items, from the Special Functions page.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.
3. Click **Show all bulletin items, including expired terms** to view bulletin items. The All Bulletin Items page appears.

How to Edit a Daily Bulletin Item

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.
3. Click the date of the bulletin item you want to edit. The Edit Daily Bulletin Item page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Daily Bulletin Item*.
5. Click **Submit**. The Daily Bulletin Setup page displays the edited bulletin item.

How to Delete a Daily Bulletin Item

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Daily Bulletin Setup**. The Daily Bulletin Setup page appears.

3. Click the date of the bulletin item you want to delete. The Edit Daily Bulletin Item page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

How to Localize a Daily Bulletin Item

You can create different language versions of the bulletin for each locale you have configured in PowerSchool. For detailed information, see *Localize Daily Bulletin*.

Digital Certificate Management

Digital Certificate Management provides you with a central location from which to manage digital certificates. A digital certificate is an attachment to an electronic message used for security purposes. The attachment, which contains a public key and a variety of other identification information, is used to encrypt and decrypt messages to protect them against third party tampering.

PowerSchool Certificates

PowerSchool uses two digital certificates to secure communication with your PowerSchool server. This includes the server certificate used to enable SSL and possibly the client certificate used to access secure web services on other systems.

The PowerSchool server certificate is stored in the keystore. The keystore is a repository where public/private key pairs are stored. The X.509 client certificate may also be stored here if it was issued with a private decryption key. Otherwise, it is stored in the truststore.

Note: For example, Verisign issues a server certificate that also serves as a X.509 client certificate. It contains three parts: the public encryption key, the private decryption key, and the X.509 client certificate. Because the client certificate was issued with a private key, it would be stored in the keystore. StartSSL.com and other providers offer free or low-cost X.509 client certificates that are primarily used to sign emails. These certificates are stand-alone and rely on the root certificate for the Certificate Authority to be trusted. Therefore, they would be stored in the truststore. For more information, see *External Server Certificates*.

How to Import a PowerSchool Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.

3. Click **Digital Certificate Management**. The Digital Certificate Management page appears.
4. Select the **Key Store** tab, if needed.
5. Use the following table to enter information in the Import Digital Certificate fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Select an Option</td><td>Do one of the following:
Choose I have one file and a password from the pop-up menu if you have your private key and certificate authority (CA) signed certificate (such as Verisign, Start SSL) in the same file and the private key is password protected.
Choose I have one file and no password from the pop-up menu if you have your private key and CA signed certificate in the same file and the private key is not password protected.
Choose I have two files and a password from the pop-up menu if you have your private key in one file and CA signed certificate in another file and the private key is password protected.
Choose I have two files and no password from the pop-up menu if you have your private key in one file and CA signed certificate in another file and the private key is not password protected.
Choose I would like to create and import a self-assigned certificate from the pop-up menu if you want to create a private key and self-signed certificate. This option is used for test purposes. For example, you may want to test SSL or SAML communication between PowerSchool and NTC servers before setting up a production server.
Note: How do I know if my private key is password protected or not? If you generated the private key yourself using a command line tool, such as keytool, openssl, CertReq.exe, etc., or CA provided tool, such as Verisign, then you already know if the private key is password protected or not. If the private key was given to you by another person, such as from your IT department, that person should indicate if the private key is password protected or not and if it is, what the password is.</td></tr>
</table>

	Note: Once you select an option, the appropriate fields display.
Certificate Name	Enter a name for the PowerSchool certificate to be used in lists. **Note:** Do not use [System] in the name, as it is reserved by PowerSchool. If [System] is entered, the following message appears, "Certificate name cannot start with [System]".
File 1	Click **Choose File** and select a certificate.
File 2	Click **Choose File** and select a certificate. **Note:** This field only appears if applicable to the selected option.
Password	Enter your password. **Note:** This field only appears if applicable to the selected option.

6. Click **Import**. A confirmation message appears.
7. Repeat Step 6 and Step 7 for each PowerSchool certificate you want to import. The imported PowerSchool certificate appears in the List of Certificates with Private Key section.

How to View a PowerSchool Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administration page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Digital Certificate Management**. The Digital Certificate Management page appears.
4. Select the **Key Store** tab, if needed. The List of Certificates with Private Key section displays the following information:

Field	**Description**
[Status]	The status/validity of the certificate: • Checkmark indicates the certificate is valid.

	• Exclamation mark indicates the certificate will expire in next 30 days. • Double exclamation mark indicates the certificate is invalid.
Certificate Names	The name of the certificate.
Actions	Actions that can be taken for the certificate.

5. Click **View** next to the name of the PowerSchool certificate you want to view. The View Certificate pop-up appears.
6. When done viewing, close the pop-up.

How to Export a PowerSchool Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Digital Certificate Management**. The Digital Certificate Management page displays.
4. Select the **Key Store** tab, if needed.
5. In the List of Certificates with Private Key section, click **Export** next to the name of the PowerSchool certificate you want to export. The PowerSchool certificate is then saved to your Downloads folder.

How to Delete a PowerSchool Certificate

1. On the start page, choose **System** under Setup in the main menu. The District Setup page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Digital Certificate Management**. The Digital Certificate Management page displays.
4. Select the **Key Store** tab, if needed.
5. In the List of Certificates with Private Key section, click **Delete** next to the name of the PowerSchool certificate you want to remove. The Delete Certificate pop-up appears.
6. Click **Yes**. A confirmation message appears. The deleted PowerSchool certificate no longer appears in the List of Certificates with Private Key section.

External Server Certificates

External server certificates are the digital certificates of servers that you want your PowerSchool server to trust and be able to communicate with.

External server certificates are stored in the Trust Store. The Trust Store is a repository where the public certificates of servers that are trusted within the application are stored. These certificates are never used to decrypt data and thus have no need for a private key. These certificates can be the public portion of the server certificate from an external server, or a client X.509 certificate.

How to Import an External Server Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Digital Certificate Management**. The Digital Certificate Management page appears.
4. Select the **User Trust Store** tab for non-synced, user certificates.
5. Use the following table to enter information in the Import Digital Certificate fields:

Field	Description
Certificate Name	Enter a name for the external server certificate to be used in lists. **Note:** Do not use [System] in the name, as it is reserved by PowerSchool. If [System] is entered, the following message appears, "Certificate name cannot start with [System]".
Certificate	Click **Choose File** and select a certificate. **Note:** If using Firefox or Internet Explorer, Click **Browse** and select a certificate.

6. Click **Import**. A confirmation message appears.
7. Repeat Step 6 and Step 7 for each certificate you want to add. The imported certificate appears in the List of Certificates without Private Key section.

How to View an External Server Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.

3. Click **Digital Certificate Management**. The Digital Certificate Management page appears.
4. Do one of the following:
    - Select the **User Trust Store** tab for non-synced, user certificates.
    - Select the **System Trust Store** tab for synced, system certificates.

    The List of Certificates without Private Key section displays the following information:

Field	Description
[Status]	The status/validity of the certificate: • Checkmark indicates the certificate is valid. • Exclamation mark indicates the certificate will expire in next 30 days. • Double exclamation mark indicates the certificate is invalid.
Certificate Name	The name of the certificate.
Actions	Actions that can be taken for the certificate.

5. Click **View** next to the name of certificate you want to view. The View Certificate pop-up appears.
6. When done viewing, close the pop-up.

How to Export an External Server Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Digital Certificate Management**. The Digital Certificate Management page displays.
4. Do one of the following:
    - Select the **User Trust Store** tab for non-synced, user certificates.
    - Select the **System Trust Store** tab for synced, system certificates.
5. In the List of Certificates without Private Key section, click **Export** next to the name of the certificate you want to export. The certificate is then saved to your Downloads folder.

How to Delete an External Server Certificate

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Digital Certificate Management**. The Digital Certificate Management page displays.
4. Do one of the following:
    - Select the **User Trust Store** tab for non-synced, user certificates.
    - Select the **System Trust Store** tab for synced, system certificates.
5. In the List of Certificates without Private Key section, click **Delete** next to the name of the certificate you want to remove. The Delete Certificate pop-up appears.
6. Click **Yes**. A confirmation message appears. The deleted certificate no longer appears in the List of Certificates without Private Key section.

Duplicate Enrollment Records

To assist in reconciling any duplicate enrollment records, two special operations are available to help database administrators manage these records by deleting duplicates, and merging attendance data where necessary. Because the special operations involve removing duplicate data from the database, it is highly recommended that you make a backup before running the special operation.

Reconcile Duplicate Enrollments

Many duplicate enrollment records are exact matches, which can be automatically reconciled without any user input. A duplicate enrollment occurs when a student is enrolled in a section more than once, where the section ID and the enroll and exit dates are exactly the same for two or more different records. Use the **Auto-Fix Duplicate CC Enrollments** operation to automatically reconcile exact duplicate enrollments district-wide.

How to Reconcile Duplicate Enrollments

1. On the start page, choose **System** under Setup in the main menu.
2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. From the **Operation** pop-up menu, choose **Auto-Fix Duplicate CC Enrollments**.
4. Click **Submit**. The system completes the special operation. The Alert page displays the number of fixed duplicate CC enrollments.
5. To reconcile remaining duplicate records that were not exact matches, use the **Select Students with Overlapping CC Enrollments** operation.

Reconcile Overlapping Enrollments

To reconcile overlapping enrollments district-wide, you can use the **Select Students with Overlapping CC Enrollments** operation. An overlapping enrollment occurs when a student is enrolled in a section more than once, where the section ID is an exact match and the enroll and exit dates overlap for two or more different records.

How to Reconcile Overlapping Enrollments

1. On the start page, choose **System** under Setup in the main menu.
2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. Choose **Select Students with Overlapping CC Enrollments** from the **Operation** pop-up menu.
4. Click **Submit**. The Alert page displays the number of overlapping enrollments.
5. Click **Show Selection**. The Student Selection page appears.
6. Select the first student. The Clean Up Overlapping Section Enrollments page displays all overlapping enrollments for the student.
7. Before proceeding, you may directly edit enrollments or view attendance information using the following links:

Field	Description
Start or End	Click the date of the enrollment record you want to edit. The Edit Enrollment Record page appears.
Non-Blank Attendance	Click the attendance count of the enrollment record you want to view. The Dates of Attendance page appears.
All Enrollment List	Click to view the student's enrollment history The All Enrollments page appears. You can also edit a specific enrollment record on this page by clicking **Edit**.
Modify Schedule Page	Click to modify the student's schedule. The Modify Schedule - Enrollments page appears.
Refresh this Page	Click to reflect any changes made using the preceding links.

Term	If Other Years with Duplicates appears, you can click **Term** in the navigation bar to view overlapping enrollments for that term.

8. For each set of overlapping enrollments, do one of the following:
   - Leave the default option of **Leave overlapping enrollments** selected.
   - Select the enrollment record option you want to keep.
9. Click **Next Step (Attendance)**. The Merge Attendance page appears. For each enrollment record, the Date, Period, Marks Made, and Note appear.

   Note: Selections made on the Clean Up Overlapping Section Enrollments page are not saved upon clicking **Next Step (Attendance)**. The Merge Attendance page displays the impact your selections make on attendance associated to the enrolment records before any changes are actually submitted

10. Work through each enrollment group, verifying the attendance for all questionable dates. You may use the following links directly edit enrollments or view attendance information:

Field	**Description**
[Enrollment Dates]	Click the date of the enrollment you want to edit. The Edit Enrollment Record page appears.
Meeting Attendance	Click the to view attendance information. The Attendance page appears.

If you selected the **Leave overlapping enrollments** option for a group, no further action is required. If you selected an enrollment option for a group that does not contain attendance marks, no further action is required. If you selected an enrollment option for a group that does contain attendance marks, attendance marks appear in the Marks Made column.

11. For each enrollment group containing multiple marks, select the mark you want to keep.
12. For each enrollment group you want to submit, select the confirmation checkbox.
13. Click **Submit**.

Interfaces to Other Systems

Use this page to access special functions used to send and receive data from other organizations or systems.

How to Interface to Other Systems

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Interfaces to Other Systems**. The Interfaces to Other Systems page appears.
3. Click the external system to link to its functions. The specific procedures that follow are dependent on the external system.

Miscellaneous System Administration

Use the Miscellaneous page to view or change other settings that affect your school. To change miscellaneous settings for all schools on your PowerSchool system, see *Miscellaneous District Settings*.

How to Change Miscellaneous School Settings

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Miscellaneous**. The Miscellaneous page appears.
3. Use the following table to enter information in the fields:

Field	Description
Email teachers academic records of students newly enrolled in their classes	Select the checkbox if you want the system to automatically send an email message to a teacher that contains the record of a new student enrolling in his or her class.
Default term level	Choose the term duration from the pop-up menu.
Show student photo on student screens	Select the checkbox to display student photos on student pages. Photos appear only for student records that include photos. For more information, see *Photo*.

Show faculty photo on student screens	Select the checkbox to display faculty photos on faculty pages. Photos appear only for faculty records that include photos.
Allow public access to school bulletin	Select the checkbox to allow users to access the school bulletin without signing into PowerSchool. When enabled, users can access the school bulletin at a publicly-accessible address using the following format: http://[server address]/bulletin/[school number]. Replace [server address] with your server's host name or IP address. Replace [school number] with the school number of the bulletin you want to view. For example: http://powerschool.myschool.edu/bulletin/12345. Alternatively, deselect the checkbox to prevent public access to the school bulletin. When disabled, users can only access the school bulletin if they are signed into PowerSchool. **Note:** This setting only applies to the selected school. To apply to the district office, see *How to Set Up Miscellaneous District Settings*.
Student Schedule Matrix Preferences	Select the checkboxes to indicate what data you want to include on the student schedule matrix: • **Course Name**: Displays the course name. • **Course Number.Section Number**: Displays the course and section numbers. • **Teacher Name**: Displays the teacher name. • **Room**: Displays the room number. • **Expression Term**: Displays the expression, which is the period and day combination. For more information, see *How to Display a Student Schedule Matrix*.
Teacher Schedule Matrix Preferences	Select the checkboxes to indicate what data you want to include on the teacher schedule matrix: • **Course Name**: Displays the course name. • **Course Number.Section Number**: Displays the course and section numbers. • **Room**: Displays the room number.

	• **Expression Term**: Displays the expression, which is the period and day combination. • **Enrollment**: Displays the number of students currently enrolled in the section, as well as the maximum number of students allowed in the section. For more information, see *How to View the Teacher Schedule Matrix*.

4. Click **Submit**. The Changes Recorded page appears.

Page and Data Management

The Page and Data Management page provides you with a central location from which to access functionality allowing you to create and manage database extensions and fields, migrate and manage legacy custom fields, access custom page management functionality, as well as data validation, data import, data export, and data view features.

Parent/Student Access

Using the Parent/Student Access settings, you can configure which term information appears in the PowerSchool Student and Parent portal. In addition, you can disable access to the PowerSchool Student and Parent portal.

How to Configure Parent/Student Access

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Parent/Student Access**. The Parent/Student Access page appears.
3. Click the **General** tab.
4. Use the following table to enter information in the fields:

Field	Description
Parent/Student Access Term	Select the grading term for which you want the system to display the student attendance in PowerSchool Mobile and the PowerSchool Student and Parent portal.

<table>
<tr><td>Default Student Matrix Term</td><td>Use this setting to indicate what term appears as the default term when viewing the My Schedule Matrix View page. By default, the shortest possible term level appears. To change this setting, choose one of the following from the pop-up menu:
Shortest Possible
1/4 (Quarter)
1/2 (Semester)
1/3 (Trimester)
1/1 (Full Year)
Note: Changes to this setting will take effect during the PowerSchool nightly process or when the server is restarted, whichever occurs first.</td></tr>
<tr><td>Default Term Between Years</td><td>When signing into the PowerSchool Student and Parent portal, by default, the current term appears when the server date falls within a scheduling term. If the server date does not fall within a scheduling term, the term defaults to this setting. Choose one of the following from the pop-up menu:
Closest School Year (default)
Previous School Year
Next School Year
Note: Changes to this district setting will take effect during the PowerSchool nightly process or when the server is restarted, whichever occurs first.</td></tr>
<tr><td>Disable Access To Public Portal</td><td>Do one of the following:
Select the checkbox to disable access to the Student and Parent portal for all students at this school. When the portal is disabled, students and parents can sign in, however they cannot access any information. Parents can still access their other linked students from other schools if those schools have not also disabled the public portal.</td></tr>
</table>

	• Deselect the checkbox to enable access to the Student and Parent portal. When the portal is enabled, students and parents can sign in to the portal and access all information.
Custom Access Disabled Title	If access to the public portal is disabled, by default the following heading displays when users sign in to the Student and Parent portal: **Information Not Available** To change this heading, enter the text you want to appear instead. **Note:** If left blank, the default heading displays.
Custom Access Disabled Message	If access to the public portal is disabled, by default the following heading displays when users sign in to the Student and Parent portal: **The PowerSchool Student and Parent portals for this school have been temporarily disabled. Check with your school for more information.** To change this message, enter the text you want to appear instead. **Note:** If left blank, the default message displays.

5. Click **Submit**. The Changes Recorded page appears.

How to Configure Available Features

Set which features you want to display for PowerSchool Mobile and PowerSchool Student and Parent portal.

By default, all services that display data in PowerSchool Mobile and on the PowerSchool Student and Parent portal are enabled. You can configure these services to restrict certain data that is not applicable to the parents and students at your school.

Note: If you elect to display GPA, the information that displays is based on the settings on the GPA Student Screens. For more information, see GPA Student Screens.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.

2. Under General, click **Parent/Student Access**. The Parent/Student Access page appears.
3. Click the **Available Features** tab.
4. Select the checkbox for the feature(s) you do not want to appear to parents and students.
5. Click **Submit**. The Changes Recorded page appears.

Pearson Applications

A number of Pearson applications can be used in conjunction with PowerSchool.

How to Access the Pearson Applications Page

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page displays links to the following applications:
   - Analytics
   - Schoolnet
   - SuccessNet
   - Tapestry

   Note: For more information, see respective sections.

Pearson SuccessNet

PowerSchool includes a close integration with Pearson SuccessNet (PSN) which allows you to extract PowerSchool student enrollment data into PSN. PSN, a Learning Management System (LMS) used by more than 10 million registered users, provides instruction, assessment and intervention to help K-12 teachers and students. PSN contains numerous courses in History, Languages, Literature, Mathematics, Reading, Science and many other subjects. PSN also provides planning and reporting capabilities to help teachers manage their classes.

Setup

To perform these setup procedures, you must have both PowerSchool and PSN, be a district or school administrator, and be registered on PSN. If you are not already registered on PSN, see www.pearsonsuccessnet.com to register before continuing.

Obtain PSN School IDs

Use this procedure to obtain the PSN School IDs needed for mapping PowerSchool schools to PSN.

Note: For more information, see Pearson SuccessNet's online help.

How to Obtain PSN School IDs

1. Log in to PSN as an administrator.
2. On the home page, click **Upload Students (advanced)**. The Upload School Rosters or Upload Students page appears.
3. Click the **click here for important information and to download a spreadsheet template** link. The Creating a Text File page appears.
4. In the Rules and Codes for Valid Text File Entries section, click the **Click here** link for School ID. A list of valid School IDs appears.
5. Using the list of valid School IDs, proceed to *Map PowerSchool School Number to PSN School ID* to continue.

Map PowerSchool School Number to PSN School ID

Once you have obtained a PSN School ID, you can map each of the PowerSchool schools to a valid PSN School ID.

Note: All students being exported must be tied to a valid PSN School ID in order for the student to be added successfully to PSN.

How to Map PowerSchool School Number to PSN ID

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Click **SuccessNet Pearson School ID Setup**. The SuccessNet Pearson School ID Setup page appears.
4. Use the following table to enter information in the fields:

Field	Description
School	The name of the school.
Abbrev.	The short name of the school.
School Number	School number created by PowerSchool Administrator. **Note:** The School_Number field in the Schools table is the same value that is referred to as SchoolID in all other PowerSchool Premier tables when referencing a school.
SuccessNet ID	Enter the identification number for the school provided by PSN.

5. Click **Submit**.

Generate Roster Upload File

Once you have finished mapping PowerSchool schools to PSN, you can generate the roster upload file.

Note: To generate the roster upload file for all students from a specific school, look up the school number (**District > Schools/School Info > School Number**) and then search for students based on the school number (**Start Page > SchoolID=[School Number] > Search**).

How to Generate Roster Upload File

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Click **SuccessNet Roster Upload File Creation**. The SuccessNet Roster Upload File Creation page appears. The upper portion of the page displays the report's name, version number, description, and comments.
4. Use the following table to enter information in the fields:

Field	**Description**
Students to Include	Indicate which students you want to run the report for by selecting one of the following options: • **The selected students only** to run the report for students in the current selection enrolled in the specified date range. • **All students** to run the report for all students in the current school enrolled in the specified date range.
Grades	Select the checkboxes of the grade levels you want to scan. Doing so takes the selection of students selected in the “Students to Include” section and narrows the selection to include only those students having the same grade level as those selected. Alternatively, leave all the checkboxes blank to scan all grade levels. Doing so includes all of the students selected in the “Students to Include” selection.
Destination	**Note:** This function does not apply, as the roster upload file is automatically sent to the Report Queue.

5. Click **Submit**. The Report Queue - My Jobs page appears.
6. To view the roster upload file, click **View** once the Status column for the roster upload file displays as "Completed."
7. Save the roster upload text file to your Desktop.

   Note: The roster upload file should appear as a tab-delimited text file.

Parse Roster Upload File

Once you have generated the roster upload file, you will need to review the file to see how many rows the file contains. If it is more than 1000, you will need to parse the roster upload file.

Note: The following procedures address parsing to your Desktop. However, you may also choose to parse to a directory. Be sure to note the location so that you can find the files when you are ready to upload. Parsed files, as well as a directory, can be zipped into a single .zip file before uploading.

How to Parse Roster Upload File (Macintosh)

1. Download **SplitFile.exe** for Macintosh from PowerSource to your Desktop.
2. Open the Terminal.
3. Type **cd desktop** and press **RETURN**.
4. Type **./User/[Your Login]/Desktop/SplitFileMac [NameOfRosterUploadFile.txt]** and press **RETURN**.
5. Type your password and press **RETURN**. The parsed roster upload text file appears on your Desktop.

How to Parse Roster Upload File (Windows)

1. Download **SplitFile.exe** for Windows from PowerSource to your Desktop.
2. Drag and drop the roster upload text file onto the **SplitFile.exe** icon. The parsed roster upload text file appears on your Desktop.

Roster Upload File Layout

All fields are required during upload into PSN. Missing data will cause the entire upload file to fail.

Data Element	Additional Information	[Table]FieldName	Length
School ID	Entered via **District > Pearson Applications > SuccessNet Pearson School ID Setup**.	Custom School Field: PSN_SchoolPID	Numeric value. PSN maximum of 8 digits.

FirstName	N/A	[Students]First_Name	PSN maximum of 20 characters.
MiddleName	N/A	N/A	Exports as blank for all students.
LastName	N/A	[Students]Last_Name	PSN maximum of 32 characters.
Student ID	N/A	[Students]ID	Numeric value. Maximum of 22 digits.
Grade	N/A	[Students]Grade_Level	Converts on report to: K, 01, 02, 03...12. Any other grade levels are exported as "XX."
SuccessNet Language	Not entered via PowerSchool.	N/A	Exports as “ENG” for all students.
UserName	N/A	[Students]Student_Web_ID If blank, auto-generated as [Students]Last_Name[Students]DOB	PSN requires 6-30 characters. PowerSchool allows shorter usernames. Imports into PSN will fail for all usernames

			less than 6 characters
Password	The password is auto-generated for all students. PowerSchool's student sign in password is not exported.	[Students]Last_Name[Students]DOB	Maximum of 30 characters.
Password Confirmation	Same as above.	Same as above.	Same as above.
Gender	Choose either female or male from the pop-up menu. Valid values: F = Female, M = Male.	[Students]Gender	Any gender not set is exported as “UN.”

Upload Roster File to PSN

Once you have prepared the roster upload file, you can upload the file into PSN. At the completion of this process, students will be registered within PSN and associated with their correct schools. At this point, teachers can set up classes and select the students from the school roster.

Note: For more information, see Pearson SuccessNet’s online help.

How to Upload Roster Upload File to PSN

1. Log in to PSN as an administrator.
2. On the home page, click **Upload Students (advanced)**. The Upload School Rosters or Upload Students page appears.
3. Use the following table to enter information in the fields:

Field	Description
What would you like the system to do if a student in your import file currently exists at a different school?	Select one of the following options: • **Transfer the student to the school in the import file. This will also remove the student from all classes (in PSN).** • **Consider this an error and fail the import.**
File location	Do one of the following: • Enter the file path and name of the file you want to upload. • Click **Browse**, navigate to the file you want to upload, and click **Open**.

4. Click **Upload**. The Upload History section displays the status of the upload. If no errors occur while uploading the file, the message "Successful" appears in the Status column of the uploaded file.

   Note: If an error occurs while uploading the file, the message "Failed: View errors" appears in the Status column of the uploaded file. Click the **View errors** link to view detailed information about the error, make any necessary corrections, and then upload again. Continue this process until all files are uploaded. If an error cannot be resolved, contact PSN Technical Support.

Associate Students with Classes

Once the file has been uploaded into PSN, the final step is to have the teacher associate students to their class. To do this, log into PSN, create the class if it has not already been created, and then search for students on the school roster and add them to the class. For detailed information, see Pearson SuccessNet's online help.

Photo Management

PowerSchool now provides a tool within the PowerSchool admin web portal for managing student and/or staff photos making uploading or deleting photos fast and easy. With the introduction of this web-based feature, direct access to your PowerSchool server is no longer required to add or update student or staff photos in mass.

Upload Photos

Use the Import Pictures function to upload student and/or staff photos.

Mapping Type

Before uploading student or staff photos, you need to decide the mapping type. Mapping type indicates whether you will be using student and staff numbers or names in your mapping file. Mapping by student or staff number is performed at the district level. Whereas mapping by student or staff name is performed at the school level in order to reduce the risk of duplicating records. If mapping by student or staff name, individual zip files and mapping files will need to be created for each school for which you want to upload photos.

Mapping File

Once you have determined your mapping type, then you need to create a tab-delimited mapping text file. The mapping file is used to specify which columns in your mapping file correspond to which photos in your zip file. The information contained within the mapping file depends on you mapping type and can be obtained by exporting from the Students or Teachers table and including the applicable fields, such as Student_Number, TeacherNumber, Last_Name, First_Name, etc.

If uploading student or staff photos using student or staff numbers, the mapping file must contain the following data: **[Student_Number] or [TeacherNumber]** and **[File Name]**. Column headers are not required. For example:

420101752	1.jpg
420103883	2.jpg
420101493	3.jpg
420101494	4.jpg

If uploading student photos using student names, the mapping file must contain the following columns and data: **Last_Name**, **First_Name**, **Middle_Name** (optional), and **Grade_Level** (optional). Column headers are required for all columns except the last column containing the file name. For example:

Last_Name	First_Name	Grade_Level	
davis	deanne	9	1.jpg
davis	teresa	9	2.jpg
deyo	karen	9	3.jpg
draper	catherine	9	4.jpg

If uploading staff photos using staff names, the mapping file must contain the following columns and data: **Last_Name**, **First_Name**, and **Middle_Name** (optional). Column headers are required for all columns except the last column containing the file name. For example:

Last_Name	First_Name	
hunter	david	1.jpg
johnson	marla	2.jpg
lee	anthony	3.jpg
morris	sam	4.jpg

Zip File

Before uploading photos, you need to create a flat zip file of the photos you want to upload.

How to Upload Photos

Note: Uploading photos by student or staff ID number can only be done by district level. Uploading photos by student or staff name can only be done at the school level.

1. On the start page, choose **System** under Setup in the main menu.
2. Under Data Management, click **Photo Management**. The Photo Management page appears.
3. Click **Import Pictures**. The Import Pictures page appears.

4. Use the following table to enter information in the fields:

Field	Description
Group	Indicate the group for which you want to import photos by choosing one of the following from the pop-up menu: • **Students** • **Staff**
Zip File	Enter the file path and name of the zip file or click **Browse** to select the zip file.
Mapping File	Enter the file path and name of the mapping file or click **Browse** to select the mapping file.
Mapping Type	To map based on student or staff ID, choose **Student/Staff Number** from the pop-up menu. To map based on student or staff name, choose **Student/Staff Name** from the pop-up menu.

5. Click **Upload**. The Import Photos Results page displays a summary of the processed records and any failures.

   If uploading student photos, possible error messages include:

Error	Description
Failed to load student record – Caused by using an invalid student number in the mapping file.	Correct invalid student number and then perform import again.
Failed to update the database – Caused by internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.

Failed to process picture – Caused by invalid image data or internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.
Failed to locate student record – Caused by invalid student name.	Correct invalid student name and then perform import again.
Failed to update student record – Caused by internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.
Failed to find image in archive – Specified file was not found at top level of archive.	Move image file to top level of archive and then perform import again.
Failed to extract image – Caused by internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.

If uploading staff photos, possible error messages include:

Error	Description
Failed to load teacher record – Caused by using an invalid teacher number in the mapping file.	Correct invalid teacher number and then perform import again.
Failed to update the database – Caused by internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.
Failed to process picture – Caused by invalid image data or internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.
Failed to locate teacher record – Caused by invalid teacher name.	Correct invalid teacher name and then perform import again.

Failed to update teacher record – Caused by internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.
Failed to find image in archive – Specified file was not found at top level of archive.	Move image file to top level of archive and then perform import again.
Failed to extract image – Caused by internal error.	Check the system logs. Contact your PowerSchool system administrator, if needed.

Delete Photos

Use the Delete Pictures function to delete student and/or staff photos.

Note: Deleting photos results in all photos being deleted for the entire district regardless of whether or not a school is selected. It is important to note that this action is irreversible.

How to Delete Photos

1. On the start page, choose **System** under Setup in the main menu.
2. Under Data Management, click **Photo Management**. The Photo Management page appears.
3. Click **Delete Pictures**. The Delete Pictures page appears.
4. Indicate the photos you want to delete by choosing one of the following from the **Group** pop-up menu:
    - **Student**
    - **Staff**
5. Click **Delete**. A confirmation message appears.
6. Click **Delete**. The Delete Photos Results page displays a summary of the deleted records.

PowerSchool Monitor

PowerSchool Monitor is a stand-along application that resides on the host server. Using PowerSchool Monitor, you can monitor the state of PowerSchool services with the information provided by the various logs and address items that require attention.

Startup Errors

PowerSchool startup may be aborted under certain conditions, such as if a schema update requires a re-start on upgrade or an error is encountered. To identify the condition which caused the startup to abort, refer to the PSJ Runtime Log and Lifecycle Log.

Launch PowerSchool Monitor

When installing PowerSchool, you have the option to indicate whether or not you want PowerSchool Monitor to automatically launch when logging into Windows. This is done by creating a shortcut to the application in the Windows\Startup folder. In addition, a shortcut is also created in the Program Files\PowerSchool\ folder, which can be double-clicked to manually start PowerSchool Monitor.

Note: The shortcut in the PowerSchool folder is created regardless of whether or not PowerSchool Monitor is set to automatically launch when logging into Windows.

Actions Menu

The Action Menu appears in the toolbar and includes the following functions:

Action	Description
Pause	Select to pause all log file monitoring.
Resume	Select to resume/start all log file monitoring.
Reinit	Select to restart monitoring logs from their beginning.
About	Select to view information about this instance of PowerSchool Monitor.
Exit	Click to end this PowerSchool Monitor session.

PowerSchool Monitor Configuration

Use the Config tab to configure PowerSchool Monitor run-time properties on a per-session basis.

Note: The next time PowerSchool Monitor is launched, all modified settings are replaced by the default settings.

How to Configure PowerSchool Monitor

1. Launch PowerSchool Monitor.
2. Click the **Config** tab.
3. Use the following table to enter information in the fields:

Field	Description
Find Log Pause	Enter the number of seconds the system should wait between checking to see if a log exists. By default, this value is set to **5**.
Read Log Pause	Enter the number of seconds the system should wait between checking to see if a new log entry exists. By default, this value is set to **5**.
Max List Size	Enter the maximum number of log lines to display. By default, this value is set to **1000**.
Retained List Size	Enter the number of log lines of context you want retained in log window after maximum is exceeded. By default, this value is set to **10**.
Throttle Window	Some error conditions, such as loss of database connectivity, result in a tremendous number of log messages. The PowerSchool Monitor is responsible for reading each message, and if it meets the filter criteria, display it. In certain situations the PowerSchool Monitor could consume all the available CPU capacity trying to keep up with reading the log, making it very difficult to take corrective action. Throttling is what the PowerSchool Monitor uses to prevent this condition – it limits the amount of CPU it will consume. Every time throttling suspends or resumes log monitoring, lifecycle events will be written thus alerting you of the high volume of log activity. Enter the window of time (in seconds) within which the maximum number of log lines can be read (throttle threshold). By default, this value is set to **1**. The window of time resets when the maximum number of log lines are read or if the interval of time has expired since the last log message.

Throttle Threshold	Enter the maximum number of log lines that can be read in Throttling Window seconds before throttling. By default, this value is set to **2500**.
Throttle Pause	Enter the period of time (in seconds) that the PowerSchool Monitor will pause monitoring the log file if throttling is required. By default, this value is set to **10**.

4. Click **Apply to Current Session**.

Status Log

The Status tab shows the health of any monitored Tomcat container. The container is considered up if it can serve pages, down if it can't make network contact, and transitional if it is somewhere in between.

How to Monitor the Status Log

1. Launch PowerSchool Monitor.
2. Click the **Status** tab. The Status page displays the following information for each Tomcat container:

Field	**Description**
[Tomcat Container]	If this checkbox is selected, the Tomcat container is being monitored. If this checkbox is not selected, the Tomcat container is not being monitored. The dot indicates the status of the connection and indicates the last date and time the health of the system was checked: • Green: Indicates the system is up and serving pages. • Yellow: Indicates that the system is either coming up or going down. • Red: Indicates that the system is down and cannot make network contact. • Gray: Indicates that the system is not being monitored.

PSJ Runtime Log

Use the PSJ tab to monitor the PSJ runtime log. Monitoring can be toggled on or off using the **Play** and **Pause** buttons. Entries which were historically written to data/log<date>pslog.txt_ are now mirrored in the psj-runtime log and identified as such.

How to View PSJ Runtime Log

1. Launch PowerSchool Monitor.
2. Click the **PSJ** tab. The PSJ-Runtime log appears.
3. Use the following table to enter information in the fields:

Action	Description
Filter	From the toolbar click and select the filter you would like to apply to narrow or widen the log messages that appear: • **All** • **PSLog** • **Fatal** • **Error** • **Warn** • **Info**
[Pause Button]	Click to pause the log.
[Play Button]	If you have paused the log, click to unpause. **Note:** By default, monitoring is on.

LifeCycle Log

Use the LifeCycle tab to monitor lifecycle events. LifeCylce events are considered events that denote a state change or require intervention. When the system transitions from stopped to starting, or vice versa, an entry is made in the LifeCycle log. These events are not deemed to require intervention and are there to provide context. Any other log line that matches one of the LifeCycle events changes, such as schema update which requires a restart, will cause the LifeCycle tab to turn red until the log is viewed by clicking the tab.

How to View LifeCycle Log

1. Launch PowerSchool Monitor.
2. Click the **LifeCycle** tab. The LifeCycle log appears.

Gradebook Launch Installers

The PowerTeacher Gradebook Launch installers provide you with a way to distribute a new launch method for the Gradebook that protects teachers from Java updates. It also includes a desktop shortcut that allows teachers to login to the Gradebook directly. Teachers with access to install and run files on their computers can complete the quick setup themselves. Or you can access the installers to help with their deployment.

How to Install Gradebook Launch

The Gradebook Launcher is installed one time on each computer that accesses PowerTeacher Gradebook. Once installed, teachers can click Launch on the PowerTeacher navigation menu, or use the desktop shortcut to launch the Gradebook.

To navigate to more information on helping teachers with the install, choose **System** under Setup in the main menu on the start page. The System Administrator page appears.

1. Click **System Settings**. The System Settings page appears.
2. Click **Gradebook Launch Installers**. The Gradebook Launch Installers page appears.
3. Do one of the following:
    - Click **Windows (All users on computer)** to download and install the all users version of the launcher. Deploy this installer in a lab environment where multiple users sign in to a single computer.
    - Click **Windows (Single user)** to download and install the single user version of the launcher. This is the same installer that is available to teacher from PowerTeacher portal. Deploy this installer if you have only a single user access the Gradebook.
    - Click **Mac** to download and install the Mac version of the launcher. Be sure and move the Gradebook.app to the /Applications folder after installation if multiple users will access the Gradebook.

    Note: Click the FAQ tab for troubleshooting tips.

    Note: Internet Explorer with SmartScreen Filter enabled may see a warning message when downloading the launcher. On the warning message, click **More Options**, and then select **Run Anyway** to allow the launcher to download.

Remote Connection Management

Remote Connection Management allows you to configure a connection to a secure remote server. Remote connections are configured from the PowerSchool Plugin Console.

When you create a remote connection, it is available to select as a report parameter when generating certain state-specific reports. For more information, see the applicable state reporting guide available on PowerSource.

Page permissions determine the options available on the Remote Connection Management page.

Important Note: This feature is currently used for state/provincial reporting to establish a remote connection from your PowerSchool server to a reporting authority. For more information, refer to the reporting guide for your state or province.

Enable/Disable Remote Connection Manager

Enable Remote Connection Manager to configure a remote connection to PowerSchool.

How to Enable Remote Connection Manager

By default, Remote Connection Management is enabled. Once enabled, you can configure a remote connection, upload, and download reports.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Console Configuration**. The Plugin Console Dashboard page appears.
4. Select the **Enable/Disable Remote Connection Manager** checkbox.

How to Disable Remote Connection Manager

Once you have enabled Remote Connection Manager, it may become necessary to render it inoperative. If Remote Connection Manager is disabled, you configure a remote connection in PowerSchool, but you cannot upload or download reports.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Console Configuration**. The Plugin Console Dashboard page appears.
4. Deselect the **Enable/Disable Remote Connection Manager** checkbox. A confirmation message appears.

5. Click **Yes**.

Work with Remote Connections

You can create, view, edit, and delete remote connections on the Manage Remote Connections page. PowerSchool page permissions determine the available options on this page, depending on the user ID.

How to Add a Remote Connection

Enter the information you receive from the host of the remote server on the Remote Connection Management page in order to configure the remote connection.

Note: The remote connection is dependent on the network firewall in order to operate correctly. Be sure your network allows for remote connections before configuring this feature.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Console Configuration**. The Plugin Console Dashboard page appears.
4. Click **Configure** next to Remote Connection Manager. The Remote Connection Manager Setup page appears.
5. Click **Remote Connection Manager**. The Manage Remote Connections page appears.
6. Click **Create Connection**. The Create Remote Connection dialog appears.
7. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for the connection.
Description	Enter a description for the connection. This information is only visible on this dialog when viewing existing connections.
Protocol	Select the format for transferring data from the pop-up menu.
Allow unsecure ciphers	Do one of the following

	• Select the checkbox to allow PowerSchool to use a larger set of encryption options (ciphers) to communicate with the SFTP server. • Deselect the checkbox to allow PowerSchool to use the most secure encryption options (ciphers) to communicate with the SFTP server. This is the more secure option.
Host	Enter the IP address or server DNS.
Port	Enter the port number. The default port is 22.
Username	Enter the username provided by the remote server host.
Password	Enter the password provided by the remote server host.
Confirm Password	Re-enter the password to confirm.
Test Connection	Click to assure that the remote connection is configured correctly and established a connection to the server. A message appears on the dialog if the connection is successfully established.
Finger Print	This security information is populated when you accept the host key and a successful connection is established with the remote server. To enter a host key received via secure email or another communication method, click the hyperlink to display the Host Key field.
Host Key	Click the **Finger Print** hyperlink to display this field. Copy and paste the host key information received from the remote host via secure email or another communication method into this field. Once the information is entered in the field, click Test Connection again to verify the server security.

Remote Path	Leave this field blank in order for the PowerSchool report to automatically detect the correct folder path unless you are directed to enter a folder path manually.
Allow Download	Select the checkbox to allow downloads from the remote connection.
Allow Upload	Select the checkbox to allow uploads to the server from PowerSchool.

8. Click **Submit**. The Create Connection dialog closes.

How to Edit a Remote Connection

You can only edit a remote connection if you have permissions assigned to do so.

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Console Configuration**. The Plugin Console Dashboard page appears.
4. Click **Configure** next to Remote Connection Manager. The Remote Connection Manager Setup page appears.
5. Click **Remote Connection Manager**. The Manage Remote Connections page appears.
6. Click the remote connection you want to edit. The Edit Remote Connection dialog appears. Edit information as needed. For field descriptions, see *How to Add a Remote Connection*.
7. Click **Submit**.

How to Delete a Remote Connection

1. On the start page, choose **System** in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Plugin Console Configuration**. The Plugin Console Dashboard page appears.
4. Click **Configure** next to Remote Connection Manager. The Remote Connection Manager Setup page appears.
5. Click **Remote Connection Manager**. The Manage Remote Connections page appears.

6. Click the remote connection you want to delete. The Edit Remote Connection dialog appears.
7. Click **Delete**. The Confirm Delete button appears on the dialog.
8. Click **Confirm Delete**. The Edit Remote Connection dialog closes and the connection is removed from the Manage Remote Connections page.

School Map

You can upload a map of your campus that is visible to students using the PowerSchool Parent and Student Mobile apps. Add text to the map to allow students to search for specific information. For best results, use a PDF with a maximum files size of 1 MB.

How to Upload a School Map

Upload a school map in PDF, JPEG, or PNG format. See the upload page for detailed information on recommended specifications.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **School Map**. The School Map page appears.
3. Click **Choose File** (or **Browse**) to select the school map file.
4. Click **Submit**. The School Map page appears. The uploaded map file appears as a download link.

How to Delete a School Map

Once the school map has been uploaded, you may need to remove it in the future.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **School Map**. The School Map page appears.
3. Click **Delete School Map**. The School Map page appears and the school map link is removed.

Search Page Contents

You can search for either whole strings, or you can specify a starting string and an ending string (<img src="`">). You may use both search types in a query. If you specify starting and ending strings, they must be on the same line, separated with the accent character ( ` - it's right above the tab key). If you do not specify any search arguments, you simply get a list of each file in that directory.

The search direction affects how start and end strings are handled. If you search forwards, the search engine looks for an occurrence of the starting string, then finds the closest ending string. If you search backwards, the search engine looks for an occurrence of the ending string, then finds the closest starting string. Why would you want to search backwards? Suppose you want to get a list of all images used on pages. You might search for ("`.jpg"). By searching backwards, we find ' .jpg" ' first, then look back to the closest double quote. If you searched forwards, your search results would begin with the first double quote on the page, then continue on to the first ' .jpg" '.

Results to return tells the search engine how many results to display. If you select unique values only (which is really most useful when specifying starting and ending strings), you will only receive one search result per successful query. If you select all occurrences, you will receive every successful query. Using the above example, if you specify 'Unique values only', the search results will list each unique image only once, regardless of the number of pages on which it is found. Otherwise, you will get a list of every file that contains that image.

Finally, your search results can either be sorted by the search result or the file path.

How to Search for Page Contents

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Click **Search Page Contents**. The Search Pages Contents page appears.
3. Use the following table to edit information in the fields:

Field	Description
Directories to Search	Enter the directories you want to search.
Search Subdirectories?	Indicate if you want to search subdirectories by selecting one of the following: • **Yes** • **No**
Valid File Extensions	Enter valid file extensions. You may enter multiple extensions. Each extension must be on a new line.

Search Arguments	Enter search arguments, if any. You may enter multiple arguments. Each argument must be on a new line. See the note below on how the search works.
Search Direction	Indicate the direction you want to run the search by selecting one of the following: • **Search forwards** • **Search backwards**
How to Search	Indicate if you want to include search arguments by selecting one of the following: • **Contains any** • **Does not contain any search arguments**
Results to Return	Indicate the results you want returned by selecting one of the following: • **Unique values only** • **All occurrences of search arguments**
How to Sort Results	Indicate how you want results sorted by selecting one of the following: • **By search result** • **By file path**

4. Click **Submit**. The Search Page Contents Results page appears.
5. Click the file path to view the page.

How to View Page Contents

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Click **Search Page Contents**. After the system scans for customized pages, the Search Page Contents Results page appears.

3. Click **View** next to the page name in the File Path column. The page appears.

How to Edit Page Contents

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Click **Search Page Contents**. After the system scans for customized pages, the Search Page Contents Results page appears.
3. Click **Edit** next to the page in the File Path column. The File Download dialog appears.
4. Click **Save this file to disk**.
5. Click **OK**. The Save As dialog appears.
6. Select a file location.
7. Click **Save**. The Search Page Contents page appears. Edit the file using the appropriate application.

Special Operations

Use Special Operations to perform a variety of specialized procedures for your school's PowerSchool data as directed by PowerSchool Technical Support. For example, run the special operation **Clear student photos** to remove all student photos from the selected school.

To recalculate lunch balances for all students, select the **Recalculate lunch balances** operation. To recalculate lunch balances for a single student, see *How to Recalculate a Student's Lunch Balance*.

How to Run a Special Operation

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. Use the following table to enter information in the fields:

Field	Description
Operation	Choose the operation from the pop-up menu.
Server	Choose the task server you want to start from the pop-up menu.

Param 1	Enter the information provided by PowerSchool Technical Support.
Param 2	Enter the information provided by PowerSchool Technical Support.
Code	Enter the information provided by PowerSchool Technical Support.

4. Click **Submit**. The system completes the special operation.

How to Stop/Start the Task Server

The task server runs on each node and runs five-minute, hourly, nightly, monthly, etc., jobs. If an issue arises during one of these jobs, you can temporarily suspend the task server using the **Stop Task Serve**r special operation in order to troubleshoot the issue. Once you have resolved the issue, you will want to immediately restart the task server using the **Start Task Server** special operation. Restarting the task server It will automatically restart the node.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Special Operations**. The Special Operations page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Operation	Do one of the following: • To stop the task server, choose **Stop Task Server** from the pop-up menu. • To restart the task server, choose **Start Task Server** from the pop-up menu.
Server	Do one of the following:

	• Choose the task server you want to stop from the pop-up menu. • Choose the task server you want to restart from the pop-up menu.

4. Click **Submit**. The system completes the special operation.

State Report Security

Using the Edit State Report Security page, you can restrict access to certain PowerSchool state reports to further promote security. When working with the access restriction matrix, note the following:

- Restrict Report Access must be enabled in order to edit the access restriction matrix.
- A checkmark indicates that a security group can access a report.
- A circle with a line through it indicates that a security group cannot access a report. If restrictions have been applied, the circle with a line through appears in the Reports cell, the security group cell, and the report name cell.
- A pencil indicates that access restrictions have been modified from their original state but have not yet been saved. If restrictions have been modified, the pencil appears in the Reports cell, the security group cell, and the report name cell.
- Use the access restriction matrix scroll bars to see portions of the access restriction matrix that are not within view.
- Access restrictions that have been modified from their original state appear highlighted until you click **Refresh** or **Submit**.

How to Edit State Report Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **State Report Security**. The Edit State Report Security page appears.
3. Use the following table to enter information in the fields:

Field	Description

Restrict Report Access	Do one of the following: • Choose **Yes** from the pop-up menu to enable the access restriction matrix. When enabled, restrictions can be applied. • Choose **No** from the pop-up menu to disable the access restriction matrix. When disabled, all security groups have access to all reports. This is the default setting.
Reports	In the first cell of the header row, Reports appears. To edit all reports for all security groups: 1. When hovering over the Reports cell, all security groups and all reports appear highlighted. 2. Double-click the **Reports** cell to toggle the access restriction.
[Security Group]	In the subsequent cells of the header row, the name of each security group appears. To edit all reports for a selected security group: 1. When hovering over a security group cell, all reports for the selected security group appear highlighted. 2. Double-click the security group name to toggle the access restriction.
[Report Category]	In the first column, the name of each report category appears in alphabetically ascending order. To edit all reports within a report category for all security groups: 1. When hovering over a report category cell, all reports within the report category and all security groups appear highlighted. 2. Double-click the report category cell to toggle the access restriction.

	To edit all reports within a report category for a security group: 1. When hovering over a column cell in the report category row, all reports within the report category for the respective security group appear highlighted. 2. Double-click the column cell in the report category row to toggle the access restriction.
[Report Name]	In the first column, report names appear under their respective report categories in alphabetically ascending order. To edit a report for all security groups: 1. When hovering over a report name cell, all security groups appear highlighted. 2. Double-click the report name cell to toggle the access restriction. To edit a report for a security group: 1. When hovering over the intersecting cell of a report and security group, the cell appears highlighted. 2. Double-click the intersecting cell of the report and security group to toggle the access restriction.

5. Do one of the following:
   - Click **Refresh** to revert any pending changes highlighted.
   - Click **Submit** to save your changes.

   A confirmation message appears.

6. Click **OK**.

Tapestry

Tapestry is a web-based connected learning environment built specifically for K-12. Tapestry provides a platform for seamlessly integrating aligned digital content and assessments with analytics, next generation web tools, and PowerSchool in real-time through a single point of access.

Configure Tapestry Single Sign-On (SSO) Settings

Using single sign-on setup, you can configure the settings needed for establishing a successful SSO connection between Tapestry and PowerSchool making the transition between Tapestry and PowerSchool seamless.

How to Configure Tapestry Single Sign-On (SSO) Settings

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Pearson Applications**. The Pearson Applications page appears.
3. Click **Tapestry Single Sign-On (SSO) Settings**. The Tapestry Single Sign-On (SSO) Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
SSO Inbound Enabled	Select the checkbox to enable inbound SSO. When enabled, a user signed into Tapestry can access PowerSchool and PowerTeacher without having to sign in to PowerSchool.
Tapestry Public Key	Enter Tapestry's public key string supplied to PowerSchool by the Tapestry administrator. **Note:** Because the key is a 256+ alphanumeric string, it is strongly recommended that you copy and paste the string into this field.
SSO Outbound Enabled	This feature is currently unavailable.
Tapestry Hostname or IP address	This feature is currently unavailable.

5. Click **Submit**.

Teacher Maximum Load

Use the Teacher Maximum Load function to prevent teachers from being scheduled to teach more students in a day than is allowed by their contracts. Activate the Teacher

Maximum Load function at the district level and give each teacher who has a maximum load a value of the number of students they can teach in a day. To activate this function, see *How to Set Up Miscellaneous District Settings*. To specify a maximum load per teacher, see *Staff Scheduling Preferences*.

For sections to count towards a teacher's daily maximum load, you must modify the section to not be exempt from the maximum load calculation. Since you may not want some classes (such as supervised study hall) to count towards a teacher's maximum load, you can set sections as exempt from the maximum load calculation. To set a section's load status, see *Sections*.

When specifying a teacher's maximum load, the number must be a numeric integer representing the total number of students that a teacher can be scheduled for on any given day. Also, the aggregation of the number of students scheduled for a teacher is be based on seats scheduled; that is, if a student is scheduled into more than one of that teacher's classes, then the student is counted as many times as they are scheduled in that teacher's classes.

There are two ways to report on teacher maximum load information. One reports on the sections' maximum enrollment and the teachers' maximum student load for the term in which the specified date is included. However, since a section may have added or dropped enrollments, the report displays aggregated numbers for the maximum load. For more information, see *How to Run the Teacher Maximum Load Report*. The other recalculates the teacher maximum load and displays each enrollment violation for the current date. For more information, see *How to Calculate Teacher Maximum Load*.

How to Calculate Teacher Maximum Load

Use this function to display load violations and to refresh the maximum load information by recalculating teachers' maximum load information. Events that require recalculations include:

- When modifying the school calendar: changing a lettered day (such as making an A day a B day), marking a day as "in session," or switching bell schedules
- When modifying a section: changing the expression [such as from 1(A) to 1(B)], changing the maximum load status to or from Exempt, or changing the assigned teacher
- When changing a teacher's maximum load, specifically to a lower number

Note: Using USM to modify the course records (CC) table invalidates the daily count for the affected teacher, thereby circumventing the preventative controls of Teacher Maximum Load function. Also, running the special operation "Recover from mass transfer out" also invalidates the maximum load count. After performing either of these activities, perform the Teacher Maximum Load Setup function to recalculate and report violations of load counts.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Scheduling, click **Teacher Maximum Load Setup**. The Teacher Maximum Load Setup page appears.
3. Select a teacher or select **All Teachers** from the **Select a Teacher** pop-up menu.
4. Click **Submit**. The Maximum Load Table Setup Progress page appears. After calculating and updating the daily load counts for the selected teacher(s), the report lists any load violations. If no violations exist, the message "No violations found" appears.

UI Examples

The pages in PowerSchool are constructed using a standardized set of HTML tags and styles using CSS. These pages provide a reference guide so that you can more easily construct and modify your custom pages. Reusing these design patterns not only makes custom page development easier, it helps you to learn to use new pages by providing a familiar look and feel.

Note: For more information about custom web pages, see the PowerSchool Administrator online help or the *Custom Web Pages User Guid*e available on PowerSource.

How to Access UI Examples via PowerSchool

1. On the start page, enter /admin/ui_examples/home.html in the **Address** field.
2. Press **ENTER** or **RETURN**. The UI Examples page appears.
3. Use the field description table to below to assist you in constructing and modifying your custom pages.

How to Access UI Examples Via PowerSchool Administrator

1. Sign in to PowerSchool. The PowerSchool start page appears.
2. Click **PS Administrator**. The PowerSchool Administrator Login page appears.
3. Log in to PowerSchool Administrator. The PowerSchool Administrator start page appears.
4. Click **Custom Pages**. The Custom Pages page appears.
5. Click **UI Examples**. The UI Examples page appears.
6. Use the following tables to assist you in constructing and modifying your custom pages:

HTML

Link	Description
Admin Page	Click to view an overview of the Admin page structure.
Teacher Page	Click to view an overview of the Teacher page structure.
Parent Page	Click to view an overview of the Parent page structure.
The Content Section	Click to view information about how to code the content area.
Tables	Click view information about how to code tables in PowerSchool.
Static Tabs	Click to view information about how to code tabs in PowerSchool.
Buttons	Click to view information about how to code buttons in PowerSchool.
Tooltips	Click to view information about how to code tooltips in PowerSchool.

JavaScript

Link	Description
Double Click Prevention	Click for information about double click prevention.
Calendar Popup	Click for information about calendar popups.
Dialog Popups	Click for information about dialog popups.
Dynamic Tabs	Click for information about dynamic tabs.
Collapsing boxes	Click for information about collapsible boxes.

Example Page

Link	Description
UI Live Example	Click to view a page that has a near complete collection of all the UI elements provided in PowerSchool.

Variable Credit

To support alternative education programs, PowerSchool now offers variable credit. Using variable credit, teachers can now specify how much credit each student is attempting (potential credit) and how much credit each student is awarded (earned credit) regardless of the credit hours specified for the course or the grade the student earned for the class in a term.

To use this feature, variable credit must be enabled either for an individual section or for multiple sections. You have the option to permit teachers to enter variable awarded credit and variable attempted credit. By default, both variable awarded credit and variable attempted credit are disabled.

Note: Setting variable credit for an individual section can be done using the Edit Section page, as well as the Variable Credit Setup page. Setting variable credit for multiple sections can only be done using the Variable Credit Setup page. When setting up variable credit, you can disable both attempted and awarded credit, enabled both attempted and awarded credit, or only enable awarded credit.

Once enabled, respective column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. For more information, see Scoresheet in the PowerTeacher Gradebook online help.

Finally, variable credit scores entered in PowerTeacher Gradebook can then be permanently stored. For more information, see *Options for Storing Variable Credit*.

Variable Credit Setup

Using variable credit setup, you can enable or disable variable credit for multiple sections. Variable credit setup also provides the option to enable and disable variable credit for an individual section.

How to Mass Update Variable Credit

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Variable Credit Setup**. The Variable Credit Setup page appears.
3. Use the following table to enter information in the fields:

   Note: Click Section List column headings to sort in ascending order. Click again to sort in descending order. Click **<<first**, **<prev**, [number], **next>**, **last>>** to view all of the Section List search results.

Field	Description
Search Filter	By default, the Section List is empty. Click the arrow, select one or more of the following checkboxes, enter the appropriate information in each field, and then click **Search**: • **Course Name** • **Course Number** • **Section Number** • **Teacher** • **Expression** • **Year** • **Term** • **Variable Awarded Credit** • **Variable Attempted Credit** • **Selected Term Context**
Change for all listed section to	Use the pop-up menus to indicate whether or not to permit teachers to enter variable credit for all sections in the Section List: • To permit teachers to enter variable awarded credit, choose **Variable Awarded Credit** from the first pop-up menu, **Yes** from the second pop-up menu, and then click **Set**. As a result, the Variable Awarded Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable awarded credit, choose **Variable Awarded Credit** from the first pop-up menu, **No** from the second pop-up menu, and then click

	Set. As a result, the Variable Awarded Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. • To permit teachers to enter variable attempted credit, choose **Variable Attempted Credit** from the first pop-up menu, **Yes** from the second pop-up menu, and then click **Set**. As a result, the Variable Attempted Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable attempted credit, choose **Variable Attempted Credit** from the first pop-up menu, **No** from the second pop-up menu, and then click **Set**. As a result, the Variable Attempted Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode.
Course Name	The name of the course.
Course Number	The number used to identify the course.
Section Number	The number used to identify the course section.
Teacher	The name of the teacher teaching the course section.
Expression	The period and day combination of the course section.
Year	The year in which the course section is being taught.
Term	The term in which the course section is being taught.
Variable Awarded Credit	Use the pop-up menu to indicate whether or not to permit teachers to enter variable awarded credit for the selected section: • To permit teachers to enter variable awarded credit, choose **Yes** from the pop-up menu. As a result, the Variable Awarded Credit column appears in PowerTeacher

	Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable awarded credit, choose **No** from the pop-up menu. As a result, the Variable Awarded Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode.
Variable Attempted Credit	Use the pop-up menu to indicate whether or not to permit teachers to enter variable attempted credit for the selected section: • To permit teachers to enter variable attempted credit, choose **Yes** from the pop-up menu. As a result, the Variable Attempted Credit column appears in PowerTeacher Gradebook on the Scoresheet in Final Grade mode. Teachers may enter any desired numerical value. • To prevent teachers from entering variable attempted credit, choose **No** from the pop-up menu. As a result, the Variable Attempted Credit column will not appear in PowerTeacher Gradebook on the Scoresheet in Final Grade mode.

4. Click **Submit**. The Variable Credit Setup page appears and the message "Changes Saved" displays.

Reports

Report Templates

Import report templates from another school that uses PowerSchool. For example, if a PowerSchool administrator from another school already created a report you need, that administrator can attach and send the report template file to you in an email message. When you receive the file, import the template into your PowerSchool system.

Export report templates to share with other PowerSchool administrators or to save as a backup for the template. In addition, by exporting a template and then deleting it, you can remove a template from the system without losing it permanently.

How to Import a Report Template

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Import Report Template**. The Import Report Template page appears.
3. Enter the file path and name of the template in the File to Import field or click **Choose File** (or **Browse**) to select the template file.
4. Click **Import**. The Alert: Template Successfully Imported page appears.

How to Export a Report Template

Export a report template to import into another PowerSchool system or to save as a backup. Report templates can be exported for custom reports only: form letters, mailing labels, object reports, or report cards.

1. On the start page, choose **System Reports** under Reports in the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page.
3. Click **Form Letters**, **Mailing Labels**, **Object Reports**, or **Report Cards**.
4. Select the report to be exported as a template. The Edit Form Letter, Edit Mailing Label Layout, Object Report: [report name], or Report Card page appears.
5. Click **Export as Template**. The File Download dialog appears.

   Note: Export as Template link varies based on selected report template.

6. Select **Save this file to disk**.
7. Click **OK**. The Save As dialog appears.
8. Select a file location.
9. Click **Save**. The system exports the report template.

Report Queue Preferences

Administrators can set global preferences for the report queue, such as how many days a report can remain in the queue. For more information about the report queue, see *Report Queue*.

To view or work with PowerReports, click the PowerReports tab. For more information, see *PowerReporting Administrator Report Queue*.

How to Set Report Queue Preferences

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Reports, click **Report Queue Settings**. The Report Queues page appears.
3. Click **Preferences**. The Report Queue Preferences page appears.
4. Use the following table to enter information in the fields:

Field	Description
Automatically delete completed jobs after	Enter the number of days each job remains in the report queue. After the specified number of days, PowerSchool automatically deletes the affected job.
Maximum pending jobs per user	Enter the maximum number of jobs each user can have in the report queue at one time. To indicate no limit, enter **0**.
Number of report processes	Enter the maximum number of report processes, or number of reports running at the same time. This setting does not take effect until the next time the PowerSchool server is restarted.
Automatically start Report Queue on system startup	Select either **Startup** or **Don't Startup** to indicate what you want the report queue to do when the PowerSchool server restarts. **Warning:** Modifying this setting affects restarts, so use extreme caution when selecting this option. If you indicate Don't Startup and want to manually start the report queue, enter **Repo_Batch_Startup** in the PowerSchool Server's Execute window. To disable the report queue for a single restart instead of modifying this setting, press COMMAND+OPTION (Mac) or CTRL+ALT (Windows) when starting the PowerSchool Server. The report queue will not start up for this session but will do so when the server restarts.

5. Click **Submit** to save your changes.

Reporting Segments

If your school is in the state of California, use this page to view, create, change, or delete reporting segments or terms for the selected school. The system uses reporting segments for non-monthly reports such as the Enrollment by Grade report.

Note: Be sure you do not skip dates between the reporting segments you define, or reports might not be accurate.

On this page, the system displays the name, start date, end date, and sort order for each existing reporting segment.

How to Create a Reporting Segment

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Reporting Segments**. The Reporting Segments page appears.
3. Click **New**. The Edit Next Segment page appears.
4. Use the following table to enter information in the fields:

Field	Description
Segment Name	Enter a description of the segment.
Start Date	Enter the first day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
End Date	Enter the last day of the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Sort Order	Choose a sort order from the pop-up menu.

5. Click **Submit**. The Reporting Segments page displays the new segment.

How to Edit a Reporting Segment

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Reporting Segments**. The Reporting Segments page appears.

3. Click the name, start date, end date, or sort order for the reporting segment you want to edit. The Edit Next Segment page appears.
4. Edit the information as needed. For field descriptions, see *How to Create a Reporting Segment*.
5. Click **Submit**. The Reporting Segments page displays the edited segment.

How to Delete a Reporting Segment

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Reporting Segments**. The Reporting Segments page appears.
3. Click the name, start date, end date, or sort order for the reporting segment you want to delete. The Edit Next Segment page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

ReportWorks Administrator Report Queue

Administrators can view all queued and completed reports regardless of the user on the ReportWorks tab. For more information about the user-specific report queue, see *ReportWorks Queue*.

How to View Queued Reports in the Report Queue

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queues page appears.
3. Click the **ReportWorks** tab.
4. Click **Queued Reports**. The All Queued ReportWorks Reports page appears.
5. Click **Refresh** to update the page.
6. Use the following table to view information in the fields:

Field	Description
Created On	The date the report was generated appears.
Report Name	Click the name to open the Report Details dialog. For more information, see *How to View Completed ReportWorks Details*.

Started	The date and time the report job started appears.
Create By	The username of the person who ran the report appears.
Status	The status of the report job appears: • Running: Job is processing. • Pending: Job has not started
Options	Icons appear depending on the status of the report. • Click the **Trash Can** icon to delete a report. • Click the **Cancel** icon to cancel a running or pending report.

How to View Completed Reports in the Report Queue

When a report runs completely, view the job details.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queues page appears.
3. Click the **ReportWorks** tab.
4. Click **Completed Reports**. The All Completed ReportWorks Reports page appears.
5. Use the following table to view information in the fields:

Field	Description
Created On	The date the report was generated appears.
Report Name	Click the name to open the Report Details dialog. For more information, see *How to View Completed ReportWorks Details*.
Started	The date and time the report job started appears.

Create By	The username of the person who ran the report appears.
Output Type Icon	The output type of the associated report appears. Click the icon to view the report.
Status	The status of the report job appears: • Completed: Job is finished. Click the hyperlink to view the report. • Canceled: Job has been canceled.
Options	Icons appear depending on the status of the report. • Click the **Trash Can** icon to delete a report. • Click the **Regenerate** icon to re-run a completed or canceled report.

How to View Completed ReportWorks Details

When a report runs completely, view the job details.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **Report Queue Settings**. The Report Queues page appears.
3. Click the **ReportWorks** tab.
4. Click **Completed Reports**. The All Completed ReportWorks Reports page appears.
5. Click the job name of the report. The Report Details dialog appears.
6. Use the following table to view information in the fields:

Field	Description
Report Name	The name of the report appears.
Description	The report description appears.
Status	The status of the report job appears:

	• Completed: Job is finished. Click the hyperlink to view the report. • Canceled: Job has been canceled.
Created On	The date the report was generated appears.
Create By	The username of the person who ran the report appears.
Started	The date and time the report job started appears.
Ended	The date and time the report job ended appears.
Error Code	The code used to cancel the report appears.
Error Message	Details regarding the cancellation of the report appear.

7. Click **Close Details** to close the dialog.

ReportWorks Administration

The Report Works Administration page is where you create categories to organize reports. These categories appear on the ReportWorks report page and in the ReportWorks developer application. In addition, the ReportWorks Administration page allows you to set preferences that affect the ReportWorks timeout setting, the report scheduler node, load balancer address, and report queue settings.

Changing the settings on this page may require a restart of Tomcat. For more information, see the *Administering Tomcat* section of the *PowerSchool Installation Guide* available on PowerSource.

How to Create Report Categories

You must create categories in order to have ReportWorks publish reports to PowerSchool. If no categories are created, the **Application** and **Category** pop-up menus in ReportWorks will be blank.

Note: At least one category must be created in order for PowerSchool to appear as a selection on the **Application** pop-up menu in ReportWorks.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **ReportWorks Administration**. The ReportWorks Administration page appears.
3. Click **Report Categories**. The Report Categories page appears.
4. Click **Add New Report Category**. A blank **Name** field appears at the bottom of the page.
5. Enter the name of the report category in the **Name** field.
6. Click **Submit**. The category appears at the bottom of the page.

How to Delete Report Categories

Delete one or multiple categories that do not have published reports assigned to them.

1. On the ReportWorks Administration page, click **Report Categories**. The Report Categories page appears.
2. Click the **X** icon next to the Name field of the category or categories you want to delete. The category appears shaded, marking it for deletion.
3. Click **Submit**.

   Note: An error message appears if the category has a published report assigned to it.

How to Sort Report Categories

When new categories are created, they appear at the bottom of the category list by default. Change the order in which the categories appear with the sort function.

1. On the ReportWorks Administration page, click **Report Categories**. The Report Categories page appears.
2. Click and hole the horizontal three-line icon and drag up or down to change the display order of the categories.
3. Click **Submit**. The new sort order is saved, and the updated order appears in ReportWorks and on the ReportWorks Reports page.

   Note: You must click **Submit** to save the updated sort order.

How to Set ReportWorks Preferences

Set specific preferences related to the ReportWorks application and the ReportWorks queue.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **ReportWorks Administration**. The ReportWorks Administration page appears.
3. Click **ReportWorks Preferences**. The ReportWorks Preferences page appears.
4. Use the following table to enter information in the fields:

Field	Description
ReportWorks Scheduler Node	Enter the node address in the field to designate the server that collects submitted reports for scheduling. Changing this value in a server array environment requires a restart of all Tomcat instances in the cluster. The Scheduler Node does not run or execute the report, it simply schedules them. The node(s) that execute the report is specified in the **Scheduler Sends Report Rendering Work to** field.
Scheduler Sends Report Rendering Work to (address and port)	Enter localhost, the fully qualified domain name of a different server running Tomcat, or the IP address of the load balancer. In a single server environment, the default is the local host and port specified during the ReportWorks Service installation or configuration process. By default the port for the ReportWorks tomcat service is **7980**. In a server array environment using a load balancer, set this value to the address or fully qualified domain name of the load balancer. For example: http://loadbalancer.powerschool.com:7980/powerschool-sdkhttpinvoke. This address designates the node that generates the report. In a load balanced environment, any of the nodes in the Tomcat pool (set up on the load balancer) may execute the report. OR Enter localhost, the fully qualified domain name of a different server running Tomcat, or the IP address of the load balancer. In a single server environment, the default is the local host. Make sure you set this to the same port that was specified during the

	Application installation. The default port is **7980** for the ReportWorks tomcat service. In a server array environment using a load balancer, set this value to the address or fully qualified domain name of the load balancer. For example: http://loadbalancer.powerschool.com:7980/powerschool-sdkhttpinvoke. This address designates the node that generates the report. In a load balanced environment, any of the nodes in the Tomcat pool (set up on the load balancer) may execute the report.
Number of Concurrent Report Jobs	Select the number of report jobs that can run at the same time from the pop-up menu.
Completed Report Retention Period	Select the number of days to retain completed reports in the report queue from the pop-up menu. ReportWorks has a nightly cleanup job that deletes reports older than the number of days specified in this field. Changing this setting requires that the Scheduler Node Tomcat instance to be restarted.
ReportWorks Application Timeout	Select the timeout period from the pop-up menu. This indicates the number of minutes that the application is inactive before it requires you to sign in again. The default setting is 60 minutes.

5. Click **Submit** to save the preferences.

How to Set Grades Data Set Refresh Status

Enable the Grades data set to automatically refresh during the nightly process.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **ReportWorks Administration**. The ReportWorks Administration page appears.
3. Click **Grades Data Set**. The Grades Data Set page appears.
4. Use the following table to select information:

Field	Description
Data Set Status	Select **Enabled** from the pop-up menu to enable this feature. When enabled, the Grades data set appears in ReportWorks and can be used to create projects and reports. Alternatively, select **Disabled** from the pop-up menu to disable this feature. When disabled, the Grades data set no longer appears in ReportWorks. As a result, new projects and reports can no longer be created using the Grades data set and any existing projects and reports containing the Grades data set are deleted. **Note**: If you select Disabled, any existing reports using the Grades data set in all ReportWorks Report Queues will be deleted. Alert report developers before disabling the feature.

5. Click **Submit**.

How to Manually Refresh the Grades Data Set

The Grades data set automatically refreshes at 1:30 a.m. each day. Use the following procedure to enable the refresh as needed.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Reports, click **ReportWorks Administration**. The ReportWorks Administration page appears.
3. Click **Grades Data Set**. The Grades Data Set page appears.
4. Click **Refresh**. While the process is running, the status on the page displays "Running."
    - If the process completed without errors, the status on the page displays "Success" with the date and time of the successful completion. Be sure this process status displays before regenerating ReportWorks reports based on the Grades data set.
    - If the process failed, the status on the page displays "Failed" with the date and time of the failed process.

    Note: Depending on the size of the data set, this process can take more than 30 minutes to complete.

How to Refresh the Grades Data Set

The Grades data set automatically refreshes at 1:30 a.m. each day. Use the following procedure to enable the refresh as needed.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Click **ReportWorks Administration**. The ReportWorks Administration page appears.
3. Click **Grades Data Set Refresh**. The Grades Data Set Refresh page appears.
4. Click **Start Refresh**. While the process is running, the status on the page displays "Running."

   If the process completed without errors, the status on the page displays "Success" with the date and time of the successful completion. Be sure this process status displays before regenerating ReportWorks reports based on the Grades data set.

   If the process failed, the status on the page displays "Failed" with the date and time of the failed process.

   Note: Depending on the size of the data set, this process can take more than 30 minutes to complete.

System Styles

System styles are used when creating custom reports. They include font, font size, and alignment. Use this page to add styles, edit styles, and set style defaults.

Fonts are an important part of how your custom reports look. Perhaps you like report titles to be in large, bold, capital letters. Or perhaps you prefer that footer text be small and italicized. PowerSchool provides several styles you can use so that you don't have to set these preferences each time. Or create new styles according to your own preferences and needs. If you do not want to create styles at this point, you can still create reports. For more information, see *Report Cards*.

How to Add a Style

Once you add a style to the system, you cannot delete it.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Styles**. The Styles page appears.
4. Click **New**. The Edit a Style Definition page appears.

5. Use the following table to enter information in the fields:

Field	Description
Style Name	Enter the name of the style.
Font	Choose a font from the pop-up menu.
Font Style	Select any combination of the three style checkboxes: • **Bold** • **Italic** • **Underline**
Font Size	Enter the font size in points. **Note:** One point is 1/72 of an inch.
Line Height	Enter the height of each line in a paragraph in points. **Note:** One point is 1/72 of an inch.
Alignment	Choose the paragraph alignment from the pop-up menu: • **Default** • **Left** • **Center** • **Right**
Use This As The Default System Style	Use the pop-up menu to choose **Yes** if you want the system to apply this font to all reports, unless you specify a different font when you create a report. Otherwise, choose **No**.

6. Click **Submit**. The Styles page displays the new style.

How to Edit a Style

Although you cannot delete a style, you can edit style information.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Styles**. The Styles page appears.
4. Click the style you want to edit. The Edit a Style Definition page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Style*.
6. Click **Submit**. The Styles page displays the edited style.

Scheduling

Automated Calendar Setup

The Automated Calendar Setup tool can be used in combination with Calendar Setup to set up or edit your school's calendar for the current academic year. The Automated Calendar Setup tool simplifies the calendar setup process by providing you with a quick and easy way to perform the following functions for a specified date range:

- Set In-Session Flags
- Set Cycle Days Pattern
- Set Bell Schedule Value
- Set Membership Value
- Set Membership Type
- Set Note
- Clean Up Not-In-Session Days

Prerequisites

- Set up years and terms.
- Set up periods and days, either when setting up years and terms or by committing a master schedule.
- Set up attendance conversions.
- Set up bell schedules.
- Set up holidays and vacations on your school's calendar for the current academic year.

How to Use Automated Calendar Setup (Simple Mode)

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Automated Calendar Setup**. The Automated Calendar Setup page appears

3. Use the following table to enter information in the Dates to Affect section:

Field	Description
First Date to be Changed	Enter the first date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term, must be today or later, and be before or equal to the last date to be changed.
Last Date to be Changed	Enter the last date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must be later than today and fall within the selected school year term.

4. In the Setup Mode section, select the **Simple** option.
5. Use the following table to enter information in the Weekdays Setup section:

   Note: All calendar fields, including those left blank, will overwrite existing data between the start and end dates specified above.

Field	Description
Day of the Week	Each day of the week appears, including weekends.
Cycle Day	Choose the cycle day for the specific date from the pop-up menu.
Bell Schedule	Choose the bell schedule you want to assign to this date from the pop-up menu.
School In-Session	If your school does not use tracks and all students attend school on the same dates, select the checkbox to indicate that school is in session for all students on this date.

	Note: When editing, the total of in-session days appears at the top of the page.
Membership Value	Enter the attendance value students receive if they are present in school on this date.
Tracks In-Session	If your school uses multiple student tracks, select the checkboxes for the tracks for which school is in session on this date. **Note:** If your school uses tracks, determine which students are on Track A and which students are on Tracks B, C, D, E, and F. These track names are standard and appear only on the Calendar Setup page.
Type	Choose the appropriate membership type as defined in the district setup. For example, **Holiday**.
Note	Enter any comments to describe the schedule on this date, such as **Spring Break**.

6. Click **Submit**. The Automated Calendar Setup page for the current academic year appears.

How to Use Automated Calendar Setup (Advanced Mode)

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Automated Calendar Setup**. The Automated Calendar Setup page appears
3. Use the following table to enter information in the Dates to Affect section:

Field	Description
First Date to be Changed	Enter the first date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears.

	Note: The date entered must fall within the selected school year term, must be today or later, and be before or equal to the last date to be changed.
Last Date to be Changed	Enter the last date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must be later than today and fall within the selected school year term.

4. In the Setup Mode section, select the **Advanced** option.
5. Use the following table to enter information in the Days of Week to Change section:

Field	Description
Days of Week to Change	Indicate the days of the week you want to update by selecting the appropriate checkboxes: • **Monday** • **Tuesday** • **Wednesday** • **Thursday** • **Friday** • **Saturday** • **Sunday**

6. Use the following table to enter information in the Set School and Track In-Session Flags section:

Field	Description
Set School and Track In-Session Flags	Select the checkbox to set which tracks are in-session for a particular range/pattern of days.

[Set In-Session Flags]	For each days of the week you want to set, select the appropriate flag from the pop-up menu: • **[Blank] Leave As-Is** • **In-Session** • **Not-In-Session** **Note:** To reset the calendar to its "out of the box" state, set the date range to the entire school year, set the days to change to Monday through Friday, and set all tracks and the master in-session flags to **In-Session**.

7. Use the following table to enter information in the Set Cycle Days Pattern section:

Field	**Description**
Set Cycle Days Pattern	Select the checkbox to set the cycle days pattern for all in-session days within the specified date range.
Follow Pattern	Indicate the cycle days pattern you want to follow by choosing the appropriate cycle days from the applicable pop-up menus.
Reset Day Pattern Every	Indicate the day of the week you want to reset the cycle days pattern by selecting the appropriate checkbox: • **Monday** • **Tuesday** • **Wednesday** • **Thursday** • **Friday** • **Saturday** • **Sunday**
Suspend Day Pattern for Days	Indicate the days of the week you want to suspend the cycle days pattern by selecting the appropriate checkboxes: • **Monday**

	• **Tuesday** • **Wednesday** • **Thursday** • **Friday** • **Saturday** • **Sunday**
Handle Not-In-Session Days as	Indicate how you want to handle not-in-session days by selecting one of the following options: • Select **Ignore** to continue the cycle days pattern on not-in-session days. • Select **Pass Over** to suspend the cycle days pattern on not-in-session days and resume the pattern on the next in-session day. • Select **Reset** to restart the cycle days pattern after not-in-session days.

8. Use the following table to enter information in the Set Bell Schedule Value section:

Field	**Description**
Set Bell Schedule Value	Select the checkbox to set the bell schedule value for all in-session days within the specified date range.
Adjust Which Bell Schedules	Select one of the following options: • **Empty** to update empty bell schedules to a new bell schedule value. • **All** to update all bell schedules to a new bell schedule value.
Set Value to	Choose the new bell schedule value from the pop-up menu.

9. Use the following table to enter information in the Set Membership Value section:

Field	Description
Set Membership Value	Select the checkbox to set the membership value for all in-session days within the specified date range.
Set Value to	Enter the new membership value (attendance value students receive if they are present in school).

10. Use the following table to enter information in the Set Membership Type section:

Field	Description
Set Membership Type	Select the checkbox to set the membership type for all in-session days within the specified date range.
Set Value to	Select the new membership type from the pop-up menu.

11. Use the following table to enter information in the Set Note section:

Field	Description
Set Note	Select the checkbox to enter a note regarding all in-session days within the specified date range.
Set Value to	Enter the note.

12. Use the following table to enter information in the Clean Up Not-In-Session Days section:

Field	Description
Clean Up Not-In-Session Days	Select the checkbox to perform the following basic cleanup of not-in-session days, such as holidays or weekends, within the specified date range:

	• Cycle Day will be reset to blank. • Bell Schedule will be reset to blank. • All A-F Track In-Session flags will be cleared (not in-session). • Membership Value will be set to 0.0. • Membership Type will be reset to blank. • Note will be reset to blank.

13. Click **Submit**. The Automated Calendar Setup page for the current academic year appears.

Calendar Membership Types

Define calendar membership types before setting up the school calendar. Assign them to days on your school calendar. For example, create a Holiday calendar membership type to assign to holidays. Calendar membership types are for informational use only and do not affect attendance calculations.

How to Add a Calendar Membership Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **Calendar Membership Types**. The Calendar Membership Types page appears.
3. Click **New**. The Edit Calendar Membership Type page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter a code for the membership type.
Meaning	Enter a description of the code.

5. Click **Submit**. The Calendar Membership Types page displays the new membership type.

How to Edit a Calendar Membership Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **Calendar Membership Types**. The Calendar Membership Types page appears.
3. Click the link in either the code or meaning column for the membership type you want to edit. The Edit Calendar Membership Type page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Calendar Membership Type*.
5. Click **Submit**. The Calendar Membership Types page displays the edited membership type.

How to Delete a Calendar Membership Type

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **Calendar Membership Types**. The Calendar Membership Types page appears.
3. Click the link in either the code or meaning column for the membership type you want to delete. The Edit Calendar Membership Type page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Calendar Setup

Use Calendar Setup to view, edit, or set up your school's calendar for the current academic year. At the top of the page, the system displays the month you are currently viewing and the six months before and after it. While your school calendar displays information regarding when school is in session for users, the system uses the calendar and the prerequisites you define to calculate your school's ADA/ADM statistics that you report to your state.

Prerequisites

- Set up years and terms.
- Set up periods and days, either when setting up years and terms or by committing a master schedule.
- Set up attendance conversions.
- Set up bell schedules.

Calendar

Before the start of a school year, define each field for each date in that year. During the school year, you might need to edit or update your school's calendar. For example, at the beginning of the year, assume you define a normal bell schedule for January 5. On that date, a snowstorm causes a two-hour delay and students are not able to make it to their first two periods. You can change the bell schedule and membership value you originally defined for the date and enter a note to explain the circumstances. By changing the bell schedule for that day, you can either remove the first two periods from that day or shorten all the periods for the day.

How to Set Up a Calendar

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Calendar Setup**. The Calendar Setup page appears.
3. Click a month to view its calendar. For example, click **3/15** to view the calendar for March of 2015.
4. Use the following table to enter information in the fields:

Field	Description
Date	Each day of the month appears, including weekends.
Cycle Day	Choose the cycle day for the specific date from the pop-up menu.
Bell Schedule	Choose the bell schedule you want to assign to this date from the pop-up menu.
School In-Session	If your school does not use tracks and all students attend school on the same dates, select the checkbox to indicate that school is in session for all students on this date. **Note:** When editing, the total of in-session days appears at the top of the page.
Membership Value	Enter the attendance value students receive if they are present in school on this date.
Tracks In-Session	If your school uses multiple student tracks, select the checkboxes for the tracks for which school is in session on this date.

	Note: If your school uses tracks, determine which students are on Track A and which students are on Tracks B, C, D, E, and F. These track names are standard and appear only on the Calendar Setup page.
Type	Choose the appropriate membership type as defined in the district setup. For example, **Holiday**.
Note	Enter any comments to describe the schedule on this date, such as **Spring Break**.

5. Repeat the previous step for each date needing schedule definition.
6. Click **Submit**. The Changes Recorded page appears.
7. Click **Back** to return to The Calendar Setup page.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

How to Edit a Calendar

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Calendar Setup**. The Calendar Setup page appears.
3. Click a month to view its calendar. For example, click **1/03** to view the calendar for January of 2003.
4. Edit information as needed. For field descriptions, see *How to Set Up a Calendar*.
5. Repeat the previous step for each date that needs editing.
6. Click **Submit**. The Changes Recorded page appears.
7. Click **Back** to return to The Calendar Setup page.

   Note: If a "Warning Page Expired" message appears, click the **PowerSchool** logo to return to the start page.

How to Verify the Number of School Days in a Term

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Calendar Setup**. The Calendar Setup page appears.
3. Click a month to view its calendar. For example, click **1/03** to view the calendar for January of 2003.

4. Click **Verify # of school days in the current term**. The School Days page displays the number of school days in the current term.

   Note: To change the current term, see *How to Change Terms*.

How to Display Days not in Session in Mobile Apps

Display days not in session in the Parent and Student Mobile apps.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Calendar Setup**. The Calendar Setup page appears.
3. Click a month to view its calendar. For example, click **1/03** to view the calendar for January of 2003.
4. Deselect the **In Sess** checkbox for the applicable day or days.
5. Select a type from the **Type** pop-up menu.
6. Enter further information in the **Note** field, if applicable. This information appears in the Mobile apps.
7. Click **Submit**. The days not in session with a type selected will now appear in the Parent and Student Mobile apps.

   Note: In order for Not in Session days to appear in the Parent and Student Mobile apps, a **Type** must be selected, and the **In Sess** checkbox must be deselected. It is also a good idea to add a descriptive note to the day to let parents and students know why school is not in session.

Bell Schedules

Set up bell schedules to correlate periods with the times that the periods meet and to determine which periods are taught on which calendar days. When setting up your school calendar, you can associate different bell schedules to different days of the year. For example, set up a bell schedule called Assembly, where each period meets for a shorter amount of time to accommodate a school event that day.

You must first set up an attendance conversions to properly calculate attendance. For more information, see *Attendance Conversions*.

Note: Do not set up bell schedules until after you commit your master schedule. If you set up bell schedules and then re-commit a master schedule, the bell schedules lose their references to the schedule periods. Without this reference, you cannot take attendance. For more information about committing your master schedule, see *When to Commit the Master Schedule*.

How to Set Up Bell Schedules

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click **New**. The New Bell Schedule page appears.
4. Use the following table to edit information in the fields:

Field	Description
Name	Enter a name for the bell schedule. For example, enter **H** or **Half** for half-day schedules.
Attendance Conversion Method	Choose the attendance conversion from the pop-up menu. For more information, see *Attendance Conversions*. **Note:** The number of periods in the attendance conversion must not exceed the number of periods in the bell schedule.

5. Click **Submit**. The new bell schedule appears on the Bell Schedules page.

How to Edit Bell Schedules

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click the name of the bell schedule you want to edit. The Edit Bell Schedule page appears.
4. Edit the information as needed. For field descriptions, see *How to Set Up Bell Schedules*.
5. Click **Submit**. The Bell Schedules page displays the edited bell schedule.

How to Delete Bell Schedules

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click the name of the bell schedule you want to delete. The Edit Bell Schedule page appears.
4. Click **Delete**.

5. Click **Confirm Delete**. The Selection Deleted page appears.

Bell Schedule Items

Bell schedule items indicate the start and end times for each period, which can be used to calculate daily attendance and average daily attendance. All periods used for scheduling purposes must have an associated bell schedule.

How to Set Up Bell Schedule Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click **Edit Schedule** next to the bell schedule you are working with. The Bell Schedule: [bell schedule] page appears.
4. Click **New**. The New Bell Schedule Item page appears.
5. Use the following table to edit information in the fields:

Field	Description
Period	Choose the period from the pop-up menu.
Start Time	Enter a start time for the period. Indicate if it is AM or PM.
End Time	Enter a finish time for the period. Indicate if it is AM or PM.
Counts for ADA	Select the checkbox to count this bell schedule item in average daily attendance calculations.
Day Part	Indicate the portion of the day Average Daily Attendance (ADA) is to be calculated by choosing one of the following from the pop-up menu: • **Blank** – Counts only toward full day ADA. • **AM** – Counts toward full day and AM ADA. • **PM** – Counts toward full day and PM ADA. **Note:** This field only appears if Day Part Attendance is enabled.

Use For Daily Attendance	Select the checkbox to use daily attendance for this bell schedule item. If you select the checkbox, enter the start and end times that will be used to calculate daily attendance.

6. Click **Submit**. The Bell Schedule: [bell schedule] page displays the new bell schedule item.
7. Repeat steps 4-6 for each period in the bell schedule.

How to View Bell Schedule Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page displays the following:
    - Period
    - Day Part
    - Start Time
    - End Time
    - Duration

    Note: Day Part only appears if Day Part Attendance is enabled. For more information, see the *State and Provincial Reporting Day Part Attendance Setup Guide* available on PowerSource.

How to Edit Bell Schedule Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click **Edit Schedule** next to the bell schedule you are working with. The Bell Schedule: [bell schedule] page appears.
4. Click the period number for the bell schedule item you want to edit. The Edit Bell Schedule Item page appears.
5. Edit the information as needed. For field descriptions, see *How to Set Up Bell Schedule Items*.
6. Click **Submit**. The Bell Schedule: [bell schedule] page displays the edited bell schedule item.

How to Delete Bell Schedule Items

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Calendaring, click **Bell Schedules**. The Bell Schedules page appears.
3. Click **Edit Schedule** next to the bell schedule you are working with. The Bell Schedule: [bell schedule] page appears.
4. Click the period number for the bell schedule item you want to delete. The Edit Bell Schedule Item page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

Constraints

The School Setup menu includes a Scheduling link, Constraints. Click the Constraints link to access the Constraints page, which you can use to define scheduling constraints for students. Load constraints restrict the way the system loads students into courses that have already been scheduled.

This information is either captured as part of the PowerScheduler commit process or can be manually defined (added, edited, deleted) using these pages. In the past, this information was strictly defined within the context of mass scheduling within PowerScheduler.

Note: Since constraints restrict student schedules, the more constraints you define, the less flexibility the system has to load students into courses and the less optimal the resulting schedule will be. It is always best to use the fewest number of constraints required to accomplish your scheduling goals.

How to Add a Student/Student Avoid Constraint

Use a Student/Student Avoid constraint to specify that two selected students cannot be scheduled into any of the same course sections.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Student Avoid**. The Student/Student Avoid Constraints page appears.
4. Click **New**. The Edit Student/Student Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description

Student 1	Click **Associate** to select the name of one of the students you want to separate from one another.
Student 2	Click **Associate** to select the name of the other student.

6. Click **Submit**. The Student/Student Avoid Constraints page appears.

How to Add a Student/Teacher Avoid Constraint

Use a Student/Teacher Avoid constraint to specify that this student and this teacher cannot be scheduled into any of the same course sections.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Teacher Avoid**. The Student/Teacher Avoid Constraints page appears.
4. Click **New**. The Edit Student/Teacher Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

Field	**Description**
Student	Click **Associate** to select the name of the student you want to avoid scheduling with a selected teacher.
Teacher	Click **Associate** to select the name of the teacher you want to avoid scheduling with the selected student.

6. Click **Submit**. The Student/Teacher Avoid Constraints page appears.

How to Add a Student Free Constraint

Use a Student Free constraint to specify those periods when a student must be free, such as when taking a course at another school.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Student Free**. The Student Free Constraints page appears.

4. Click **New**. The Edit Student Free Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student	Click **Associate** to select the name of the student who needs to have a free periods
Schedule	Select the checkbox next to each period in each day that you want to schedule this student to have a free periods.
Term	Choose from the pop-up menu the term that this student needs the free periods.

6. Click **Submit**. The Student Free Constraints page appears.

How to Add a Section Link Constraint

Use a Section Link constraint to specify that if students are enrolled in one course section, they must also be enrolled in another, specific course section.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Section Link**. The Section Link Constraints page appears.
4. Click **New**. The Edit Section Link Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Course Number 1	Click **Associate** to select the name of one of the courses for which you want to link a section.
Section Number 1	Enter the section number of the course in the Course Number 1 field that you want to link to another course section.

Course Number 2	Click **Associate** to select the name of the other course for which you want to link a section.
Section Number 2	Enter the section number of the course in the Course Number 2 field that you want to link to the section in the Section Number 1 field.

6. Click **Submit**. The Section Link Constraints page appears.

How to Add a Student Preference Constraint

Use a Student Preference constraint to schedule a student into a particular course section. You can also specify the course per a specific term and teacher.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click **Student Pref**. The Student Preference Constraints page appears.
4. Click **New**. The Edit Student Preference Constraint page appears.
5. Use the following table to enter information in the fields:

Field	Description
Student	Click **Associate** to select the name of the student you want to force to schedule in a specific course section.
Course Number	Click **Associate** to select the name of the course.
Section Number	Enter the section number of the course into which you want the student to be scheduled.
Term	Choose from the pop-up menu the term to which you want this constraint to apply (optional).
Teacher	Click **Associate** to select the name of the teacher who instructs this course section (optional).

6. Click **Submit**. The Student Preference Constraints page appears.

How to Modify Load Constraints

After creating load constraints, you can modify them by choosing Constraints under the Scheduling heading from the School Setup menu. Select the constraint you created to view the constraints by type.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click the name of the type of constraint you want to modify, such as Student Avoid.
4. Click the course name, student name, or teacher name in the row of the constraint you want to modify. The Edit page for that particular constraint appears.
5. Edit the information as needed:
    - Student Avoid
    - Teacher Avoid
    - Student Free
    - Section Link
    - Student Pref
6. Click **Submit**. The appropriate constraints page appears.

How to Delete Load Constraints

After creating load constraints, you can delete them by choosing Constraints under the Scheduling heading from the School Setup menu. Select the constraint you created to view the constraints by type.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Constraints**. The Constraints page appears.
3. Click the name of the type of constraint you want to delete, such as Student Preference.
4. Click the course name, student name, or teacher name in the row of the constraint you want to delete. The Edit page for that particular constraint appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

District Calendars

Use District Calendars to create one or more calendar templates. Once set up, you can quickly and easily push the calendar template to one or more selected schools. When creating a calendar template, you have the ability to enter which dates will be pushed to school calendars, allowing an entire school year to be set or just modify a few days.

District Calendar Cycle Days and Bell Schedules

Before creating a calendar template, you must define the calendar cycle days and bell schedules.

How to Create a District Calendar Cycle Day

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendar Cycle Days**. The Cycle Days page appears.
3. Click **New**. The New Cycle Day page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the cycle day name. **Note:** If the district calendar is to be copied to a school, then the cycle day name created at the district level must be identical to the one at the school level. **Note:** If a district calendar is to be copied to multiple schools, then the schools must follow the exact same naming convention for the cycle day name.

5. Click **Submit**. The Cycle Days page appears.

How to Edit a District Calendar Cycle Day

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendar Cycle Days**. The Cycle Days page appears.
3. Click the name of the cycle day you want to edit. The Edit Cycle Day page appears.
4. Edit information as needed. For field description, see *How to Create District Calendar Cycle Days*.
5. Click **Submit**. The Cycle Days page appears.

How to Delete a District Calendar Cycle Day

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendar Cycle Days**. The Cycle Days page appears.
3. Click the name of the cycle day you want to delete. The Edit Cycle Day page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Cycle Days page appears.

How to Create a District Calendar Bell Schedule

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendar Bell Schedules**. The Bell Schedules page appears.
3. Click **New**. The New Bell Schedule page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the bell schedule name. **Note:** If the district calendar is to be copied to a school, then the bell schedule name created at the district level must be identical to the one at the school level. **Note:** If a district calendar is to be copied to multiple schools, then the schools must follow the exact same naming convention for the bell schedule name.

5. Click **Submit**. The Cycle Days page appears.

How to Edit a District Calendar Bell Schedule

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendar Bell Schedules**. The Bell Schedules page appears.
3. Click the name of the bell schedule you want to edit. The Edit Bell Schedule page appears.

4. Edit information as needed. For field description, see *How to Create District Calendar Bell Schedule*.
5. Click **Submit**. The Bell Schedules page appears.

How to Delete a District Calendar Bell Schedule

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendar Bell Schedules**. The Bell Schedules page appears.
3. Click the name of the bell schedule you want to delete. The Edit Bell Schedule page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Bell Schedules page appears.

District Calendars

Once you have created cycle days and bell schedules, you can then set up a calendar template for each unique attendance schedule. Once created, the calendar template can be pushed to one or more schools.

How to Create a District Calendar

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendars**. The District Calendars page appears.
3. Click **New Calendar for [School Year]**. The New Calendar page appears.
4. Use the following table to enter information in the [Details] fields:

Field	**Description**
Calendar Name	Enter the calendar name.
Calendar Description	Enter the calendar description.
Calendar Start Date	Enter the calendar start date. This will be the first day marked as in session in the calendar.

Calendar End Date	Enter the calendar end date. This will be the last day marked as in session in the calendar. Set up the standard school week to be used as the basic weekly setup for a newly submitted district calendar. Select Day, Schedule, Tracks, in-session indicator, membership value, calendar day type and notes for the standard school week.

5. Click **Submit**. The District Calendars page appears.

How to Edit District Calendar Details

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendars**. The District Calendars page appears.
3. Click the name of the district calendar you want to edit. The Edit District Calendar *([Calendar Name])* page appears.
4. On the Details tab, edit information as needed. For field description, see *How to Create District Calendar*.
5. Click **Submit**. The District Calendars page appears.

How to Edit District Automated Calendar Setup

The Automated Calendar Setup tool simplifies the calendar setup process by providing you with a quick and easy way to perform the following functions for a specified date range:

- Set In-Session Flags
- Set Cycle Days Pattern
- Set Bell Schedule Value
- Set Membership Value
- Set Membership Type
- Set Note
- Clean Up Not-In-Session Days

Note: Automated Calendar Setup may also be used at the school level. For more information, see *Automated Calendar Setup*.

Simple Setup Mode

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Calendar, click **District Calendars**. The District Calendars page appears.
3. Click the name of the district calendar you want to edit. The Edit District Calendar *([Calendar Name])* page appears.
4. Click the **Automated Calendar Setup** tab.
5. Use the following table to enter information in the Dates to Affect section:

Field	Description
First Date to be Changed	Enter the first date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term and be before or equal to the last date to be changed.
Last Date to be Changed	Enter the last date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term.

6. In the Setup Mode section, select the **Simple** option.
7. Use the following table to enter information in the Weekdays Setup section:

   Note: All calendar fields, including those left blank, will overwrite existing data between the start and end dates specified above.

Field	Description
Day of the Week	Each day of the week appears, including weekends.
Cycle Day	Choose the cycle day for the specific date from the pop-up menu.
Bell Schedule	Choose the bell schedule you want to assign to this date from the pop-up menu.

School In-Session	If your school does not use tracks and all students attend school on the same dates, select the checkbox to indicate that school is in session for all students on this date. **Note:** When editing, the total of in-session days appears at the top of the page.
Membership Value	Enter the attendance value students receive if they are present in school on this date.
Tracks In-Session	If your school uses multiple student tracks, select the checkboxes for the tracks for which school is in session on this date. **Note:** If your school uses tracks, determine which students are on Track A and which students are on Tracks B, C, D, E, and F. These track names are standard and appear only on the Calendar Setup page.
Type	Choose the appropriate membership type as defined in the district setup. For example, **Holiday**.
Note	Enter any comments to describe the schedule on this date, such as **Spring Break**.

8. Click **Submit**. The District Calendars page appears.

Advanced Setup Mode

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendars**. The District Calendars page appears.
3. Click the name of the district calendar you want to edit. The Edit District Calendar *([Calendar Name])* page appears.
4. Click the **Automated Calendar Setup** tab.
5. Use the following table to enter information in the Dates to Affect section:

Field	Description

First Date to be Changed	Enter the first date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term and be before or equal to the last date to be changed.
Last Date to be Changed	Enter the last date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term.

6. In the Setup Mode section, select the **Advanced** option.
7. Use the following table to enter information in the Days of Week to Change section:

Field	Description
Days of Week to Change	Indicate the days of the week you want to update by selecting the appropriate checkboxes: • **Monday** • **Tuesday** • **Wednesday** • **Thursday** • **Friday** • **Saturday** • **Sunday**

8. Use the following table to enter information in the Set School and Track In-Session Flags section:

Field	Description
Set School and Track In-Session Flags	Select the checkbox to set which tracks are in-session for a particular range/pattern of days.

[Set In-Session Flags]	For each days of the week you want to set, select the appropriate flag from the pop-up menu: • **[Blank] Leave As-Is** • **In-Session** • **Not-In-Session** **Note:** To reset the calendar to its "out of the box" state, set the date range to the entire school year, set the days to change to Monday through Friday, and set all tracks and the master in-session flags to **In-Session**.

9. Use the following table to enter information in the Set Cycle Days Pattern section:

Field	Description
Set Cycle Days Pattern	Select the checkbox to set the cycle days pattern for all in-session days within the specified date range.
Follow Pattern	Indicate the cycle days pattern you want to follow by choosing the appropriate cycle days from the applicable pop-up menus.
Reset Day Pattern Every	Indicate the day of the week you want to reset the cycle days pattern by selecting the appropriate checkbox: • **Monday** • **Tuesday** • **Wednesday** • **Thursday** • **Friday** • **Saturday** • **Sunday**
Suspend Day Pattern for Days	Indicate the days of the week you want to suspend the cycle days pattern by selecting the appropriate checkboxes: • **Monday**

	• **Tuesday** • **Wednesday** • **Thursday** • **Friday** • **Saturday** • **Sunday**
Handle Not-In-Session Days as	Indicate how you want to handle not-in-session days by selecting one of the following options: • Select **Ignore** to continue the cycle days pattern on not-in-session days. • Select **Pass Over** to suspend the cycle days pattern on not-in-session days and resume the pattern on the next in-session day. • Select **Reset** to restart the cycle days pattern after not-in-session days.

10. Use the following table to enter information in the Set Bell Schedule Value section:

Field	**Description**
Set Bell Schedule Value	Select the checkbox to set the bell schedule value for all in-session days within the specified date range.
Adjust Which Bell Schedules	Select one of the following options: • **Empty** to update empty bell schedules to a new bell schedule value. • **All** to update all bell schedules to a new bell schedule value.
Set Value to	Choose the new bell schedule value from the pop-up menu.

11. Use the following table to enter information in the Set Membership Value section:

Field	Description
Set Membership Value	Select the checkbox to set the membership value for all in-session days within the specified date range.
Set Value to	Enter the new membership value (attendance value students receive if they are present in school).

12. Use the following table to enter information in the Set Membership Type section:

Field	Description
Set Membership Type	Select the checkbox to set the membership type for all in-session days within the specified date range.
Set Value to	Select the new membership type from the pop-up menu.

13. Use the following table to enter information in the Set Note section:

Field	Description
Set Note	Select the checkbox to enter a note regarding all in-session days within the specified date range.
Set Value to	Enter the note.

14. Use the following table to enter information in the Clean Up Not-In-Session Days section:

Field	Description
Clean Up Not-In-Session Days	Select the checkbox to perform the following basic cleanup of not-in-session days, such as holidays or weekends, within the specified date range:

	• Cycle Day will be reset to blank. • Bell Schedule will be reset to blank. • All A-F Track In-Session flags will be cleared (not in-session). • Membership Value will be set to 0.0. • Membership Type will be reset to blank. • Note will be reset to blank.

15. Click **Submit**. The District Calendars page appears.

How to Edit District Calendar Days

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendars**. The District Calendars *([Calendar Name])* page appears.
3. Click the name of the district calendar you want to edit. The Edit District Calendar *([Calendar Name])* page appears.
4. Click the **Days** tab.
5. Use the following table to edit information as needed:

Field	Description
Date	Each date within the calendar appears, including weekends.
Cycle Day	Choose the cycle day for the specific date from the pop-up menu.
Bell Schedule	Choose the bell schedule you want to assign to this date from the pop-up menu.
School In-Session	If your school does not use tracks and all students attend school on the same dates, select the checkbox to indicate that school is in session for all students on this date. **Note:** When editing, the total of in-session days appears at the top of the page.

Membership Value	Enter the attendance value students receive if they are present in school on this date.
Tracks In-Session	If your school uses multiple student tracks, select the checkboxes for the tracks for which school is in session on this date. **Note:** If your school uses tracks, determine which students are on Track A and which students are on Tracks B, C, D, E, and F. These track names are standard and appear only on the Calendar Setup page.
Type	Choose the appropriate membership type as defined in the district setup. For example, **Holiday**.
Note	Enter any comments to describe the schedule on this date, such as **Spring Break**.

6. Click **Submit**. The District Calendars page appears.

How to Push a District Calendar to Schools

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendars**. The District Calendars page appears.
3. Click the name of the district calendar you want to push. The Edit District Calendar *([Calendar Name])* page appears.
4. Click the **Push** tab.
5. Use the following table to enter information in the Days to Affect section:

Field	Description
First Date To Be Changed	Enter the first date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term, must be today or later, and be before or equal to the last date to be changed.

Last Date To Be Changed	Enter the last date of the date range you want to apply updates to using the format specific to your locale. If you do not use this format, an alert appears. **Note:** The date entered must fall within the selected school year term.

6. Use the following table to enter information in the Filter section:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Filter ([Number])</td><td>
Click the arrow to expand this section. Click the arrow again to collapse this section.
How to Filter Schools (Simple)
To narrow the list of schools using simple search:

Verify the Advanced checkbox is deselected.
Enter search criteria in the search field.
Click Apply. The page refreshes and display filtered results.

Note: To remove all filter selections, click Clear.

How to Filter Schools (Advanced)
To narrow the list of school using advanced search:

Select the Advanced checkbox.
Choose the column by which you want to filter courses:
School Name
Minimum Grade
Maximum Grade
Do one of the following:
Enter search criteria in the search field.
Select search criteria from the pop-up menu.
To add another filter, click + and repeat Step 1.
To delete a filter, click - next the filter.
Click Apply. The page refreshes and display filtered results.

Note: To remove all filter selections, click Clear.

</td></tr>
</table>

The following information appears:

Note: Click column headings to sort in ascending order. Click again to sort in descending order.

Field	Description
School Name	The name of the school.
Minimum Grade	The lowest grade level that will be attending this school.
Maximum Grade	The highest grade level that will be attending this school.

7. Do one of the following:
    - Select the checkbox in the header row to push the district calendar to all schools.
    - Select the checkbox next to each school you want to push the district calendar to.
8. Click **Push Calendar to Selected Schools**. When the calendar has been pushed to all of the selected schools, the Push Calendar Results pop-up displays the following information:

Field	Description
Calendar Pushed From	The name of the district calendar being pushed to schools.
Failed	The number of schools the district calendar was not successfully pushed to. Click to view a list of the schools.
Successful	The number of schools the district calendar was successfully pushed to. Click to view a list of the schools.
School Name	The name of the school. **Note:** Click column headings to sort in ascending order. Click again to sort in descending order.

Minimum Grade	The lowest grade level that will be attending this school.
Maximum Grade	The highest grade level that will be attending this school.
Status	The reason the district calendar was or was not successfully pushed to the school. The push may be unsuccessful due to any of the following reasons: • Bell schedule missing. • Calendar day count mismatch. • Cycle day missing. • Dates after the context year. • Dates before the context year. • District calendar days does not exist. • Found associated attendance for calendar days. • Invalid district calendar ID. • Invalid school number. • Invalid year ID. • No term found for school and year. • Last Date cannot be after the Calendar End Date. • First Date cannot be before the Calendar Start Date.

9. When you are done viewing, click the **x** in the upper-right corner of the Push Calendar Results pop-up to close. The Push Calendar *([Calendar Name])* page appears.

How to Delete a District Calendar

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Calendar, click **District Calendars**. The District Calendars page appears.
3. Click the name of the district calendar you want to delete. The Edit District Calendar *([Calendar Name])* page appears.
4. On the Details tab, click **Delete**.
5. Click **Confirm Delete**. The District Calendars page appears.

Periods

Use this page to view the list of periods already created for your school. Periods are set on the Years and Terms page. For more information, see *Years and Terms*. Here, you can edit period names and abbreviations.

Note: Each school on your PowerSchool system creates and maintains its own list of class periods.

Periods are used in combination with days to create schedule expressions. For example, a section of Biology that meets for the first period on each day of a two-day schedule has the expression 1(A-B). Periods are also part of what is defined as a section meeting. That section of Biology has two meetings, which are noted as 1(A) and 1(B). When running reports or viewing schedules, you can often filter by periods and/or days. Before displaying the results, however, your selections are validated against your school's bell schedule and calendar to determine if the period is valid for the selected date or date range.

How to View Periods

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Periods**. The Periods page displays the following:
    - **Period Number**
    - **Name**
    - **Abbreviation**
    - **Sort**

How to Sort Periods

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Periods**. The Periods page appears.
3. Note the **Sort** column indicates the order in which the periods will appear.
4. Drag and drop the period you want to move.
5. Repeat Step 4 for each period you want to move.
6. Click **Submit**.

How to Edit a Period

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Periods**. The Periods page appears.
3. Click the period Name or Abbreviation column. The Edit Period page appears.
4. Use the following table to edit information in the fields:

Type	Description
School Name	The name of the selected school appears.
School Year	The selected school year appears.
Period Number	The number of the selected period appears.
Period Abbreviation	Edit the abbreviation for the period, not to exceed three characters. The period abbreviation appears on various pages, such as the Edit Section page.
Period Name	Edit the name of the period. The period name can be descriptive.

5. Click **Submit**. The Periods page displays the edited period.

Preferences

The School Setup menu includes a Scheduling-related link, Preferences, used to access the Scheduling Preferences page, which you use to define scheduling preferences, teams, houses, buildings, and section types. The page is divided into five functional areas: Preferences, Teams, Houses, Buildings, and Section Types. By default, the Preferences tab is selected.

This information is either captured as part of the PowerScheduler commit process or you can manually define it (add, edit, and delete) using these pages.

How to Define Scheduling Preferences

Use this page to define parameters that determine how long the system spends scheduling each course, section, and student.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Use the following table to enter information in the Automated Walk-In Scheduling section:

Field	Description
Use Buildings	Select the checkbox if this scenario uses buildings.
Use Houses	Select the checkbox if this scenario uses houses.
Close Sections at Max Enrollment	Select the checkbox to ensure that courses close at their maximum enrollment numbers.
Use Global Course Alternate Substitution	Select the checkbox to ensure that the system automatically inserts any global course substitutes after student course substitutes have been tried and rejected.
Use Student Request Alternate Substitution	Select the checkbox to ensure that the system automatically inserts student course substitutes in the order chosen, if needed.

4. Use the following table to enter information in the Load Optimizations section:

Field	Description
Percent of schedule combinations to evaluate for each student	The default value of this field is 10. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. For example, if you enter 25, the system evaluates one-quarter of the possible schedule combinations for each student. If you enter 75, the system evaluates three-quarters of the possible schedule combinations for each student.
Minimum number of schedule combinations to evaluate before skipping	The default value of this field is 10,000. Change this value only if you encounter problems with the amount of time the system is using to build the master schedule. Entering a high number forces the system to sample a minimum number of student schedule course possibilities.

5. Use the following table to enter information in the Sorting section:

Field	Description
Class Day and Period Precedence	Choose an option from the pop-up menu to determine the sort order of the enrollments' expressions on the Modify Schedule - Enrollments student page. If sorted by **Day then Period**, enrollments are listed by day and sub-sorted by period, such as 1(A), 2(A), 3(A), 1(B), 2(B), then 3(B). If sorted by **Period then Day**, enrollments are listed by period and sub-sorted by day, such as 1(A), 1(B), 2(A), 2(B), 3(A), then 3(B).
Modify Schedule Enrollments	Choose an option from the pop-up menu to determine the sort order of the enrollments on the Modify Schedule - Enrollments student page. Select **Expression** to sort the student's enrollments by schedule expression, such as 1(A) then 2(A) or 1(A) then 1(B), depending on the sort order selected in the previous field. Select **CourseNumber-SectionNumber** to sort enrollments by course number and section number, such as ART100-2, PE101-1, then PE101-2.

6. Use the following table to enter information in the Student Alert section:

Field	Description
Incomplete Schedule	Select the checkbox to enable. If enabled, the alert "This student's schedule is incomplete." appears on the student pages for students who have an incomplete schedule. **Note:** To complete a student's schedule, navigate to the Modify schedule page via **Start Page > Select Student > Modify Schedule**. For more information, see *Course Requests and Schedule*.

7. Use the following table to enter information in the Engine Loader section:

Field	Description

Enable Server-Side Engine Loader	Select the checkbox to enable. If enabled, this feature removes the need to run the client scheduling engine on client machines, provides program balancing, and optimizes processing for faster and better results. **Note:** If enabled, define which programs you want to include in balancing. See *How to Define Program Balancing.*

8. Click **Submit**. The Changes Recorded page appears.

How to Add a Team

Some schools, most often middle or junior high schools, assign students and teachers to teams to provide the best support and monitoring system.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Teams** tab. The Teams page appears.
4. Click **New**. The Edit Team page appears.
5. Enter the name of the team (limited to 10 characters).
6. Click **Submit**. The Teams page appears.

How to Edit a Team

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Teams** tab. The Teams page appears.
4. Click the name of the team you want to edit. The Edit Team page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Team*.
6. Click **Submit**. The Teams page appears.

How to Delete a Team

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Teams** tab. The Teams page appears.
4. Click the name of the team you want to delete. The Edit Team page appears.
5. Click **Delete**.

6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a House

Some schools separate students into houses. For example, assume your school has House A (Grades 9 and 10) and House B (Grades 11 and 12). Determine which rooms, teachers, and students belong to each house. If the **Use houses** checkbox is selected on the Scheduling Preferences page, the system references which house a room is assigned to before scheduling courses in that room and gives scheduling priority to the appropriate house.

Also, sections are scheduled for houses based on the house assignment of the teachers scheduled for those sections. Students assigned to a house are assigned to a section either without a house or with the same house, whereas students not assigned a house can be assigned to any section.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Houses** tab. The Houses page appears.
4. Click **New**. The Edit House page appears.
5. Enter a name for the house (limited to 10 characters).
6. Click **Submit**. The Houses page appears.

How to Edit a House

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Houses** tab. The Houses page appears.
4. Click the name of the house you want to edit. The Edit House page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a House*.
6. Click **Submit**. The Houses page appears.

How to Delete a House

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Houses** tab. The Houses page appears.
4. Click the name of the house you want to delete. The Edit House page appears.
5. Click **Delete**.

6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Building

If your school campus contains several buildings, you can define each of them. Then, you can associate these buildings with students, teachers, and rooms. This way, the system knows to schedule courses in the appropriate building, taught by the appropriate teacher, and taken by the appropriate students.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Buildings** tab. The Buildings page appears.
4. Click **New**. The Edit Building page appears.
5. Enter a name for the building (limited to 10 characters).
6. Click **Submit**. The Buildings page appears.

How to Edit a Building

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Buildings** tab. The Buildings page appears.
4. Click the name of the building you want to edit. The Edit Building page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Building*.
6. Click **Submit**. The Buildings page appears.

How to Delete a Building

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Buildings** tab. The Buildings page appears.
4. Click the name of the building you want to delete. The Edit Building page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Add a Section Type

Section types are special sections of a course. For example, your school might offer separate sections of courses for bilingual students. In this case, one section of the course is identified as bilingual. The teacher who instructs this section has a bilingual section type assignment. The students' requests also reflect the bilingual section type.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Section Types** tab. The Section Types page appears.
4. Click **New**. The Add/Edit Section Types page appears.
5. Enter a name for the section type (limited to 20 characters).
6. Enter a section type code (limited to two characters).
7. Click **Submit**. The Section Types page appears.

How to Edit a Section Type

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Section Types** tab. The Section Types page appears.
4. Click the name of the section type you want to edit. The Edit Section Type page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Section Type*.
6. Click **Submit**. The Section Types page appears.

How to Delete a Section Type

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Preferences**. The Scheduling Preferences page appears.
3. Click the **Section Types** tab. The Section Types page appears.
4. Click the name of the section type you want to delete. The Edit Section Types page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

School Parameters

School parameters include the school's departments, facilities, and rooms, which are used for scheduling purposes. Use the following procedures to view, add, edit, or delete parameters. However, it is suggested that you define these parameters in PowerScheduler instead so that they appear system-wide. For more information, see *Departments*, *Facilities*, and *Rooms*.

Additionally, you can edit the names of cycle days, which, when combined with periods, create schedule expressions that indicate when a section is taught.

Days

How to Edit a Cycle Day Name

Use this procedure to modify a schedule day's abbreviation, which appears in places such as the master schedule.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Days**. The Cycle Days page appears.
3. Click the name or abbreviation of the day name you want to edit. The Edit Cycle Day page appears.
4. Use the following table to enter information in the fields:

Field	Description
Day Abbreviation	Enter the abbreviation for the day, not to exceed three characters.
Day Name	Enter the name of the day.

5. Click **Submit**. The Cycle Days page displays the edited day.

Departments

How to Add a Department

Create departments to sort information by department, such as on the master schedule.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Departments**. The Departments page appears.
3. Click **New**. The Add/Edit Department page appears.
4. Enter the department name.
5. Click **Submit**. The Departments page displays the new department.

How to Edit a Department

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Departments**. The Departments page appears.
3. Click the name of the department you want to edit. The Add/Edit Department page appears.
4. Edit the department name.
5. Click **Submit**. The Departments page displays the edited department.

How to Delete a Department

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Departments**. The Departments page appears.
3. Click the name of the department you want to delete. The Add/Edit Department page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Facilities

How to Add a Facility

Some courses require special equipment or facilities. For example, a chemistry course requires a lab, and a film course requires audio and video equipment. To associate courses that need special equipment, use facilities.

Note: You can assign multiple facilities to courses and rooms.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Facilities**. The Facilities page appears.
3. Click **New**. The Add/Edit Facility page appears.
4. Enter the facility name.
5. Click **Submit**. The Facilities page displays the new facility.

How to Edit a Facility

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Facilities**. The Facilities page appears.
3. Click the name of the facility you want to edit. The Add/Edit Facility page appears.
4. Edit the facility name.

5. Click **Submit**. The Facilities page displays the edited facility.

How to Delete a Facility

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Facilities**. The Facilities page appears.
3. Click the name of the facility you want to delete. The Add/Edit Facility page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Rooms

How to Add a Room

Define rooms to provide locations for courses to be taught. To determine if a room is scheduled during a particular time and day, sort the master schedule by room. For more information, see *Master Schedule*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Rooms**. The Rooms page appears.
3. Click **New**. The Add/Edit Room page appears.
4. Use the following table to enter information in the fields:

Field	Description
Room Number	Enter the room number.
Room Description	Enter a description of this room.
Department	Click **Associate** to select the department for this room. **Note:** Click **Department** on the School Setup page to create or edit departments at your school.
Building	Enter this room's building, if applicable.
House	Enter this room's house, if applicable.

Room Facilities	Click **Associate** to select this room's facilities, if applicable. Facilities are any special characteristics of a room that courses require. For example, a room might have a kitchen, computer lab, stage, or wood shop. Most classrooms do not have a facility. There is a limit of 50 characters that can be entered in this field. **Note:** Click **Facilities** on the School Setup page to create or edit facilities at your school.
Room Maximum	Enter a number to determine the maximum number of students that this room can accommodate. The capacity of the room limits the number of students that can enroll in a course.

5. Click **Submit**. The Rooms page displays the new room.

How to Edit a Room

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Rooms**. The Rooms page appears.
3. Click the name of the room you want to edit. The Add/Edit Room page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Room*.
5. Click **Submit**. The Rooms page displays the edited room.

How to Delete a Room

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Rooms**. The Rooms page appears.
3. Click the name of the room you want to delete. The Add/Edit Room page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Years and Terms

Define years and terms for your school. Years and terms affect many aspects of PowerSchool, such as the calendar setup, scheduling, enrollment, and final grades.

First, create the year term for your school. Then, define additional terms for the school year, if necessary.

Terms created on the Years & Terms page are "scheduling terms," which define the entire length of a school year (year term) as well as the length of sections offered during the school year (semester, quarter, etc.). Classes offered during the school year determine the required scheduling terms. If students have the same teacher, room, and section throughout the year, only the year term is needed. However, if students change teachers, rooms, or sections throughout the year, create additional terms of varying lengths (semester, quarter, etc.).

Note: Scheduling terms differ from "grading terms." For information about defining grading terms, see *Final Grade Setup*.

How to Add a School Year

Once you add the year term for a school, you cannot delete it.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **New**. The Create New School Year page appears.
4. Use the following table to enter information in the fields:

Type	Description
Name of School Year	Enter the school year name.
Abbreviation	Enter the abbreviation of the school year. For the year term, use numbers. For example, enter **09-10** for the 2009-2010 school year.
First Day of School	Enter the start date of the school year using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Last Day of School	Enter the end date of the school year using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.

5. Click **Submit**. The Years & Terms page displays the new school year.

How to Edit a School Year

Once you add a year term for a school, you can edit the elements of the term.

Note: When editing years and terms, be sure to follow the documented process outlined in Knowledgebase article 56872.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **Edit Terms.** The Term setup page appears.
4. Click the name of the year term. The Edit Term page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a School Year*.
6. Click **Submit**. The Years & Terms page displays the edited school year.

How to Define Terms

Define terms shorter than the year term in order to schedule sections of varying lengths (semester, quarter, etc.).

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **Edit Terms** next to the school year for which you want to define terms. The Term Setup page appears.
4. Click **New**. The Edit Term page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name of the Term	Enter the name of the term, which indicates when it occurs during the academic year. For example, enter **Semester 1**.
Abbreviation	Enter an abbreviation for the term. For the year term, use numbers. For example, enter **09-10** for the 2009-2010 school year.

	For additional terms, the first character of the abbreviation must be a letter. For example, enter **S1** for Semester 1.
First Day of Term	Enter the date of the first day of the term using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Last Day of Term	Enter the date of the last day of the term using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
What portion of the school year this term represents	Select the fraction or item that represents the portion of the school year during which the term takes place. For example, if you define Semester 1 and your school operates with trimesters, Semester 1 represents one-third of your school year.
Import File Term #	If you plan to import schedule or historical data from another system and the data is different from the abbreviation you define, enter the term code the other system uses to represent this term. For example, you might want to import data from a system that uses 1, 2, 3, and 4 to represent quarter terms Q1, Q2, Q3, and Q4. When you define **Q1**, enter **1** in the **Import File Term #** field. Then, when you import any data from the other system, PowerSchool saves information from term **1** as term **Q1**.

6. Click **Submit**. The Term Setup page displays the edited terms.
7. Repeat steps 4-6 for each term, including semesters, trimesters, or quarters.

How to Edit Terms

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Years & Terms**. The Years & Terms page appears.
3. Click **Edit Terms** next to the school year you want to edit. The Term Setup page appears.
4. Click the term you want to edit. The Edit Term page appears.
5. Edit the information as needed. For field descriptions, see *How to Define Terms*.
6. Click **Submit**. The Term Setup page displays the edited term.

School and District

CIP Setup

Classification of Instructional Program (CIP) codes are used by schools in some states to identify courses as part of a state-managed vocational program. Set up CIP codes at the district level to enter CIP codes for appropriate courses offered at each school.

How to Add a CIP Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **CIP Setup**. The CIP Setup page appears.
3. Click **New** to add a new CIP code. The CIP Edit page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the CIP code.
Codes	Enter the 6-digit CIP code.

5. Click **Submit**. The Changes Recorded page appears.

How to Edit a CIP Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **CIP Setup**. The CIP Setup page appears.
3. Click the name of the CIP code you want to edit. The CIP Edit page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a CIP Code*.
5. Click **Submit**. The Changes Recorded page appears.

How to Delete a CIP Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Courses, click **CIP Setup**. The CIP Setup page appears.
3. Click the name of the CIP code you want to delete. The CIP Edit page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Copy Final Grade Setups

Using the Copy Final Grade Setups page, you can overwrite existing Final Grade Setup from another school.

How to Copy Final Grade Setups

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Grades, click **Copy Final Grade Setups**. The Copy Final Grade Setups page appears.
3. Use the following table to enter information in the fields:

Type	Description
This School	The school in which you are currently working appears. If this is not the school into which you want to copy setup information, change the school by clicking the School link at the top of the page.
School to Copy From	Choose from the pop-up menu the school from which you want to copy setup information.

4. Click **Submit**. The system copies the information.

Copy Master Schedule

Using the Copy Master Schedule page, you can copy the master schedule (sections) from one year to another.

How to Copy the Master Schedule

1. On the start page, choose **System** under Setup in the main menu. The System Administrator Page appears.
2. Under Scheduling, click **Copy Master Schedule**. The Copy Master Schedule page appears.
3. Use the following table to enter information in the fields:

Field	Description
School	The school in which you are currently working appears. If this is not the school into which you want to copy master schedule information, change the school by clicking the School link at the top of the page.
Source year	Choose from the pop-up menu the school year from which you want to copy.
Target year	Choose from the pop-up menu the school year to which you want to copy.
Clear existing scheduling terms in the destination school year	Select the checkbox to clear any existing terms in the destination school year and copy terms from the source school year. Deselect the checkbox to attempt to match the source and destination terms. If no matches are found, the source terms are added to the destination terms.
[Confirm]	Select the checkbox to confirm that you want to proceed. **Note:** Once the checkbox is selected, the **Submit** button appears enabled.

4. Click **Submit**. The Copy Master Schedule Warnings page displays if there are any conflicts or unavailable courses. If there are no conflicts or unavailable courses, skip to Step 5.

   Note: Only school calendar conflicts are copied as part of the master schedule; unavailable courses are not.

5. Click **Submit**. The Changes Recorded page appears.

District Information

Use this page to add, view, or edit your district's information. You may need to see this information if you call PowerSchool Technical Support for a related issue.

How to Add District Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **District Info**. The District Information page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Name of District	Enter your school district's complete and official name.
District Number	Enter the number assigned to your district by your state. **Note:** In order for the PowerSchool GUID generation to function properly, the appropriate District Customer Support Number must be entered during the PowerSchool implementation process. For more information, see *PowerSchool Implementation Services* available on PowerSource.
District Address	Enter the address of the district office.
District City	Enter the city of the district office.

District State/Province	Choose your district's state or province from the pop-up menu.
District Postal Code	Enter the postal code for the district office.
District Country	Choose your district's country from the pop-up menu.
District Office Phone Number	Enter the telephone number for the district office.
District Office FAX Number	Enter the fax number for the district office.
Customer Support Number	The identification number for PowerSchool Technical Support appears. When calling PowerSchool Technical Support, you may be asked for this information.
PowerSchool District ID	The PowerSchool district ID number appears.
Summer School Year	Use the pop-up menu to indicate whether summer school should be part of the **Previous** school year or the **Next** school year.
Superintendent's Name	Enter the name of the district superintendent.
Superintendent's Phone	Enter the telephone number of the district superintendent.
Superintendent's FAX	Enter the fax number of the district superintendent.
Technical Support Email	Enter the email address for technical support. This information appears on the Parent and Student portals.

Technical Support Phone	Enter the phone number (if applicable) to call for technical support. This information appears on the Parent and Student portals.
Technical Support URL	Enter the URL (if applicable) for the district technical support web site. This information appears on the Parent and Student portals.

4. Click **Submit**. The District Information page displays the changes.

How to Edit District Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **District Info**. The District Information page appears.
3. Edit the information as needed. For field descriptions, see *How to Add District Information*.
4. Click **Submit**. The District Information page displays the changes.

Districts of Residence

Use this page to add, edit, or delete districts of residence. Your state may require you to set up districts of residents for reporting purposes.

Use the Districts of Residence function to track where a student lives. Set the value for each student on the **Transfer Info** student page. If a student changes residency districts, transfer the student out of school and then reenroll them into school to generate a reenrollment transaction record that reflects this change. Use PowerSchool attendance-related reports to reflect such status changes. For more information, see *Transfer Info* and *Attendance Reports*.

How to Add a District of Residence

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Districts of Residence**. The Districts of Residence page appears.
3. Click **New** to add a district of residence. The New District of Residence page appears.
4. Use the following table to enter information in the fields:

Field	Description
District ID	Enter a code for the district of residence, such as the state-assigned district number.
District Name	Enter a description for the code.
Sort Order	Enter a sort order to determine the order in which you want this district of residence to appears on the Districts of Residence page and in the pop-up menus on the Transfer Info student pages menu.
District Boundary	If Address Management is enabled, use this field to define the geographical boundary for your district. The geographical boundary is captured within a single encoded polyline. The encoded polyline is made up of sets of latitude/longitude pairs marking the boundary. The sets of latitude/longitude pairs are also known as points. For more information, see *Define District Boundaries*.

5. Click **Submit**. The Districts of Residence page displays the new or edited district of residence.

How to Edit a District of Residence

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Districts of Residence**. The Districts of Residence page appears.
3. Click the district of residence you want to edit. The Edit District of Residence page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a District of Residence*.
5. Click **Submit**. The Districts of Residence page displays the new or edited district of residence.

How to Delete a District of Residence

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Districts of Residence**. The Districts of Residence page appears.
3. Click the district of residence you want to delete. The Edit District of Residence page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Miscellaneous District Settings

Other district setup functions include defining miscellaneous settings, such as student photo dimension defaults.

How to Set Up Miscellaneous District Settings

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Miscellaneous**. The Miscellaneous page appears.
3. Use the following table to enter information in the fields:

Field	Description
Dimensions to display student photos in	Enter the default measurements, in pixels, for displaying student photos on each student page. In the W and H columns, enter the width and height (in pixels) of the student photos. **Note:** The recommendation is 200 W by 300 H.
Password required to delete a section	To limit users' ability to delete a course section, enter a password. Then, only users who know the password can delete course sections. Otherwise, leave this field blank.
Password required to override a section's maximum enrollment	To limit users' ability to override the maximum number of students who can enroll in a course section, define a password. Then, only users who know the password can override the maximum enrollment numbers for course sections. Otherwise, leave this field blank. For more information, see *Mass Enroll*.

Name of district that parents see on sign in screen	Enter the name of the school district as you want it to appear in the PowerSchool Student and Parent portal. For more information, see *PowerSchool Student and Parent Portal Administration*.
Teacher's Maximum Daily Student Load	Select the checkbox to use the teacher maximum load function. For more information, see *Teacher Maximum Load*.
Allow importing in district office mode	Though it is not recommended, select the checkbox to allow imports to occur at the district level. This affects both Quick Import and Data Import Manager. **Note:** Select the checkbox only when necessary. Importing data at the district level can cause serious data issues when not performed properly.
Allow importing into database extensions at the school level	Do one of the following: • Select the checkbox to allow imports into database extensions at the school level. When selected, database extensions appear in the **Import Into** pop-up menu on the Data Import Manager page. • Deselect the checkbox to prohibit imports into database extensions at the school level. When deselected, database extensions do not appear in the **Import Into** pop-up menu on the Data Import Manager page.
Disable searching on lunch status	Select the checkbox to disallow searching on lunch statuses, such as Free or Exempt. A student's lunch status, such as Free or Reduced, can be considered sensitive information. You may want to select the checkbox to protect the privacy of students and staff.
Disable meal price	Select the checkbox to hide meal prices on the screen when serving breakfast or lunch. You may want to select the checkbox to protect the privacy of students and staff. For more information, see *Serve Breakfast or Lunch*.

Do not show the lunch balance on parent/student pages	If your school/district does not use PowerLunch to track student lunch balances, select the checkbox to disable the Balance icon in the PowerSchool Student and Parent portal and PowerTeacher. When selected, the PowerSchool Student and Parent portal and PowerTeacher navigation bars no longer display the Balance icon. Alternatively, if your school/district does use PowerLunch to track student lunch balances, deselect the checkbox to enable the Balance icon in the PowerSchool Student and Parent portal and PowerTeacher. When selected, the PowerSchool Student and Parent portal and PowerTeacher navigation bars display the Balance icon. For more information, see *PowerSchool Student and Parent Portal Administration*.
Enable auto-update for state reports	If PowerSchool generates your state reports, this function updates these reports from the reporting engine. Select the checkbox to automatically retrieve any state reporting updates.
Allow public access to school bulletin	Select the checkbox to allow users to access the school bulletin without signing into PowerSchool. When enabled, users can access the school bulletin at a publicly-accessible address using the following format: http://[server address]/bulletin/[school number]. Replace [server address] with your server's host name or IP address. Replace [school number] with the school number of the bulletin you want to view. For example: http://powerschool.myschool.edu/bulletin/12345. Alternatively, deselect the checkbox to prevent public access to the school bulletin. When disabled, users can only access the school bulletin if they are signed into PowerSchool. **Note:** This setting only applies to the district office. To apply to a school, see *How to Change Miscellaneous School Settings*.
Show student photo on student screens (while in district mode)	Select the checkbox to display student photos on student screens for users signed in to the district. Leave the checkbox blank to display student photos only for users signed in to a specific school.

Show faculty photo on faculty screens (while in district mode)	Select the checkbox to display faculty photos on faculty screens for users signed in to the district. Leave the checkbox blank to display faculty photos only for users signed in to a specific school.
Enable Smart Search	Select the checkbox to enable the autocomplete search feature. Otherwise, leave the checkbox blank. For more information, see *Smart Search*.
Send anonymous data to PowerSchool for analysis	Select the checkbox to enable the sending of anonymous data to PowerSchool. Otherwise leave the checkbox blank. In order to better support PowerSchool, PowerSchool needs to understand how each of its customers has their production environments configured. To support this, when this option is enabled, your PowerSchool server will occasionally send the following information to PowerSchool: • Number of active students • Total number of students • PowerSchool version number • Number of server nodes • Operating system version running on each application node Note this does not include any identifiable information.
Enable Mobile Web Pages	Select the checkbox to enable access to the mobile pages of PowerSchool. Otherwise leave the checkbox blank. For more information, see *Enable Mobile Web Pages at the District Level* or the *Mobile Administration User Guide* available on PowerSource.
Default Term When Between School Years	When signing into PowerSchool, by default, the current term appears when the server date falls within a scheduling term. If the server date does not fall within a scheduling term, the term defaults to this setting. Choose one of the following from the pop-up menu: • **Closest School Year** (default) • **Previous School Year**

	• **Next School Year** **Note**: Changes to this district setting will take effect during the PowerSchool nightly process or when the server is restarted, whichever occurs first.
Default Term Level	When signing into PowerSchool, by default, the shortest possible term level appears. To change this setting, choose one of the following from the pop-up menu: • **Shortest Possible** • **1/4 (Quarter)** • **1/2 (Semester)** • **1/3 (Trimester)** • **1/1 (Full Year)** **Note**: Changes to this district setting will take effect during the PowerSchool nightly process or when the server is restarted, whichever occurs first.
PowerSource Registration of District's Mobile App Services	See *How to Register Your PowerSchool Server with PowerSource*.
When changing schools, always set term based on the school's default term level	Do one of the following: • Select the checkbox to enable. If enabled, when changing schools, the term is set based on the school's default term level. The **Default Term Level** is specified via **School Setup > Miscellaneous**. • Deselect the checkbox to disable. If disabled, when changing schools, the matching term abbreviation is selected. If there is no matching term abbreviation, then the school's default term level is selected. **Note:** By default, this checkbox is not selected.

Disable Student and Parent Portals/Mobile Apps	Select the checkbox to disable access to the Student and Parent portals and PowerSchool for Parents or PowerSchool for Students mobile apps. This is useful when the school is on summer break.
If Disabled, Display This Message to Student and Parents	Enter a message you want students and parents to see when they access the PowerSchool Student and Parent portals, or when accessing the PowerSchool mobile apps. A suggested message appears in the text box.

4. Click **Submit**. The Changes Recorded page appears.

Mobile Apps Setup

Before your district begins using mobile apps, it is recommended that you set up the following:

- Register your PowerSchool server with PowerSource.
- Upload a School Map (optional).

How to Register Your PowerSchool Server with PowerSource

Registering your PowerSchool server with PowerSource enables end-users to easily configure the mobile app to work with your PowerSchool server.

Enter the information needed for registering your PowerSchool server with PowerSource.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Mobile Registration**. The Mobile Registration page appears.
3. Use the following table to enter information in the PowerSource Registration of District's Mobile App Services fields:

Field	Description
Mobile District Code	Displays a four-digit code if the PowerSchool server is registered with the PowerSource mobile registration server. If the PowerSchool server has not been registered, dashes appear.
Mobile App Server Address	Enter the server or IP address remote web traffic will use for the mobile web services. This can be an individual IP, domain, or a load-balancer address. **Note:** Typically this is the same as your Tomcat server.
Mobile App Port Number	Enter the port number remote web traffic will use for the mobile web services. **Note:** Typically this is the same as your Tomcat server.

Mobile App SSL Enabled	If your Tomcat server or Load Balancer is using SSL, select the checkbox. Otherwise leave the checkbox blank. **Note:** This option does not enable or disable SSL, it only informs the PowerSource Registration that your servers are using SSL.
District Postal Code	Enter the district's postal code. This is used when teachers search for your district via zip or geo-location.

4. Click **Submit**. The Changes Recorded page appears.

School Map

You can upload a map of your campus that is visible to students using the PowerSchool Mobile. For best results, use a PDF with text for room numbers and names. This allows students and parents to search for a room number.

Note: Maximum file size for uploaded map image is 1 MB.

How to Upload a School Map

Upload a school map in PDF, JPEG, GIF or PNG format. See the upload page for detailed information on recommended specifications.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **School Map**. The School Map page appears.
3. Click **Choose File** (or **Browse**) to select the school map file.
4. Click **Submit**. The School Map page appears. The uploaded map file appears as a download link.

How to Delete a School Map

Once the school map has been uploaded, you may need to remove it in the future.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **School Map**. The School Map page appears.
3. Click **Delete School Map**. The School Map page appears and the school map link is removed.

Mobile Web Pages Setup

Before your district can begin using mobile web pages, you must set up the following items:

- Enable mobile web pages at the district level.
- Set mobile web page settings at the school level.

Once mobile web pages is enabled at the district level and mobile web pages settings are set at the school level, all staff members will have access to the mobile pages of PowerSchool using a mobile device.

Enable Mobile Web Pages at the District Level

To get started, you must enable mobile web pages at the district level.

How to Enable Mobile Web Pages

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **Miscellaneous**. The Miscellaneous page appears.
3. Select the **Enable Mobile Web Pages** checkbox to enable access to the mobile version of PowerSchool. For field descriptions, see *Miscellaneous District Settings*.

   Note: Alternatively, deselect the checkbox to disable access to the mobile version of PowerSchool.

4. Click **Submit**. The Changes Recorded page appears.

Set Mobile Browser Settings

Once mobile web pages are enabled at the district level, you can then set mobile browser settings at the school level.

How to Set Mobile Browser Settings

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Mobile Browser Settings**. The Mobile Browser Settings page appears.
3. Use the following table to enter information in the fields:

Field	Description
Disable Mobile PS (Admin)	If you want administrators in this school to be able to access the mobile pages of PowerSchool in mobile browsers, leave the **Optimized Pages** checkbox blank. Alternatively, if you do not want Administrators in this school to be able to access the mobile version of PowerSchool pages, select the **Optimized Pages** checkbox. By default, this feature is enabled.
Disable Mobile PS (Teachers)	If you want teachers in this school to be able to access the mobile pages of PowerTeacher in mobile browsers, leave the **Optimized Pages** checkbox blank. Alternatively, if you do not want teachers in this school to be able to access the mobile version of PowerTeacher pages, select the **Optimized Pages** checkbox.
Disable Mobile PS (Subs)	If you want subs in this school to be able to access the mobile pages of PowerTeacher Substitute in mobile browsers, leave the **Optimized Pages** checkbox blank. Alternatively, if you do not want subs in this school to be able to access the mobile version of PowerTeacher Substitute pages, select the **Optimized Pages** checkbox. By default, this feature is enabled.
Default Class Sort	Indicate the order by which you want classes to appear when accessing PowerSchool, PowerTeacher, and PowerTeacher Substitute using a mobile browser by choosing one of the following from the pop-up menu: • **Course/Expression** to sort by course name and then schedule expression. • **Expression/Course** to sort by schedule expression and then course name.
Hide Bus Route	If you do not want bus routes to appear when accessing PowerSchool, PowerTeacher, or PowerTeacher Substitute using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank.

Show Bus Info From Transportation or Student Fields	If you have opted not to hide bus route information, indicate which bus route information you would like to appear by choosing **Transportation** or **Student Fields** from the pop-up menu. If you chose **Transportation**, bus route information is pulled from the Transportation table. If you chose, **Student Fields**, bus route information is pulled from the Students table. For more information, see the *PowerSchool Data Dictionary Tables* available on PowerSource. Otherwise, select the checkbox.
Hide Student Photos	If you have opted not to hide bus route information, indicate which bus route information you would like to appear by choosing Transportation or Student Fields from the pop-up menu. If you chose Transportation, bus route information is pulled from the Transportation table. If you chose, Student Fields, bus route information is pulled from the Students table. For more information, see the PowerSchool Data Dictionary Tables available on PowerSource. Otherwise, select the checkbox.
Hide Lunch Count (Subs)	If you do not want student photos to appear when accessing PowerSchool, PowerTeacher, or PowerTeacher Substitute using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank. If you do not want lunch counts to appear when accessing PowerTeacher Substitute using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank.
Hide Lunch Count (Teachers)	If you do not want lunch counts to appear when accessing PowerTeacher using a mobile browser, select the checkbox. Otherwise, leave the checkbox blank.

4. Click **Submit** to save the preferences.

PowerTeacher Pro

PowerTeacher Pro includes robust functionality for managing the classroom, including advanced features for both standards-based and traditional grading. Teachers use this mobile-friendly gradebook to get their work done quickly and to analyze student performance. Administrators set up district-level grading preferences and apply them to selections of schools to provide grading consistency and to save teachers time.

Use PowerTeacher Pro to:

- Create assignment categories
- Create assignments
- Score assignments and work with grades
- Assess student and class performance
- Set up district-level grading preferences

Administrator Access to PowerTeacher Pro

Set the user access roll to allow a PowerSchool administrator user to view a teacher's PowerTeacher Pro data in read-only mode. For more information, see *User Access Roles*.

1. On the start page, choose **System > Roles Administration > User Access**.
2. Select the **PowerTeacher Pro Read Only Admin Access** checkbox.
3. Click **Submit**. A confirmation message appears.

View a teacher's PowerTeacher Pro instance in read-only mode. For more information, see *Staff Current Schedule*.

Conversion Scale Migration

PowerTeacher Pro uses grade scales exclusively for standards grades, instead of conversion scales like PowerTeacher Gradebook. Therefore, when starting PowerSchool for the first time after updating to this release, existing conversion scales will be migrated as grade scales. These migrated scales will then automatically be associated to their respective standards for use with PowerTeacher Pro.

To ensure the numeric conversion scales migrate properly, be sure that none of your existing numeric conversion scales have any of the following invalid setup issues:

- Any grade labels that are > max or < min.
- The scale is set to 0 decimals, but in the scale the grade label is a decimal value. Trailing decimal zeros are okay.
- Any whole number integers between min and max as well as the min and max themselves are missing.
- The lowest numeric grade has a cut-off percentage not equal to 0.
- Not every item has a % value and % cut-off.
- Duplicate grade labels.
- Duplicate cut-offs.

Migrating Scores to PowerTeacher Pro

PowerTeacher Pro provides a method for migrating existing assignments created in PowerTeacher Gradebook (PTG).

The following conditions must be met in order to successfully migrate assignment data:

- The Gradebook Type is set to PowerTeacher Pro for the section for the current year.
- No assignments exist in PowerTeacher Pro.
- At least one assignment exists in PTG for the current year.

If these conditions are met, the first time you launch PowerTeacher Pro, a Migrate Data to PowerTeacher Pro screen appears.

If a co-teacher launches PowerTeacher Pro before the lead teacher, all classes in which the co-teacher can edit will be migrated.

The following items will NOT migrate from PTG:

- Custom teacher-created versions of the grade scale.
- Custom teacher-created score codes (if there is no corresponding grade scale item or special code item in the grade scale). For example, a teacher enters in score code of “x” = 80%. If there is no “x” in a grade scale or special code, then “x” cannot migrate to PowerTeacher Pro, but the value of 80% is migrated correctly.
- Calculation settings. Since calculation settings do not migrate, be sure that your PowerSchool administrator has created any new grade calculation formulas in PowerSchool, or you can create grade calculation formulas in PowerTeacher Pro. For more information, see *Grade Calculations*.
- Content links
- Teacher-defined custom student fields.
- Classes that are designated as read-only in PowerTeacher Pro.

For standards, PowerTeacher Pro uses grade scales instead of conversion scales. As part of the PowerSchool 10 upgrade, copies of conversion scales have been created as grade scales and attached to the appropriate standards.

Be sure to review existing standards in PowerSchool and verify that the correct grade scales are associated to standards. If the grade scale differs from the conversion scale, the standard scores will be converted to the new grade scale and may not reflect the original grade.

When a teacher signs in to PowerTeacher Pro for the first time, the Migrate Data to PowerTeacher Pro dialog appears. When they click Migrate Data, all scores from PowerTeacher Gradebook (PTG) are migrated to PowerTeacher Pro. This guide provides an overview of what transpires with the Assignment Score and Assignment Standard Score data during this process.

For more detailed information on the full migration process, see the *PowerTeacher Pro Data Migration Guide*, available on PowerSource.

The migration performs the following basic steps:

- Reads PTG section data and teacher categories.
- Locks any final grades for complete reporting terms. For example, PGFinalGrades and StandardGradeSection rows are set to overridefg=1 or islocked=1, respectively, for completed reporting terms, so subsequent changes to PowerTeacher Pro do not affect reported grades.
- Creates teacher categories in PowerTeacher Pro.
- Creates assignments and assignment standards associations in PowerTeacher Pro.
- Creates assignment scores and assignment standards scores in PowerTeacher Pro.
- Creates teacher display preference settings in PowerTeacher Pro from PTG Preferences.

The following best case scenario is expected for assignment and assignment standards grades.

- There have been no changes to the grade scale used for the section prior to the migration.
- There have been no changes between the original conversion scale and the grade scale created and assigned to the standards associated to the course prior to conversion.

PowerTeacher Pro Settings

Several features are available at the District Office for defining PowerTeacher Pro as the default gradebook, and for configuring grading preferences and calculations.
At the district level, you can configure the grading preferences and calculations for a single school or for multiple schools to provide grading consistency, and to save teachers from having to set up the preferences in PowerTeacher Pro for each section they teach.

To set up district grading preferences, navigate to the District Setup page and then click **PowerTeacher Pro Settings**.

To view and manage the preferences at the school level, navigate to the School Setup page and click **PowerTeacher Pro Settings**. You may edit some of the preferences at the school level, but some are view-only.

Gradebook Setup

Use these settings to configure PowerTeacher Pro used at the district, display preferences for PowerTeacher Pro for each school, and the district-wide assignment categories available for teachers.

Default Gradebook Type

Set PowerTeacher Pro type at the district office. You can create assignment categories, and select how the class lists and grades appear in PowerTeacher Pro.

How to Set the Default Gradebook Type

Set the default gradebook at the District office.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Default Gradebook Type**. The Default Gradebook Type page appears.
4. Do one of the following:
    - To set PowerTeacher Pro as the default gradebook that teachers will use, select **PowerTeacher Pro** from the pop-up menu.
    - To set PowerTeacher Gradebook as the default gradebook that teachers will use, select **PTG** from the pop-up menu.
5. Click **Submit**.

Display Settings

Select options to determine how the class lists and grades (including standards and traditional grades) appear in PowerTeacher Pro.

How to Set Gradebook Display Settings at the District

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **Display Settings**. The Display Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Basic Filter	To limit the entries that appear, enter filter criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **School Name** • **Display and Sort Section By** • **Show Standards Grades** • **Show on Assignments** • **Navigation Links Sort Order** • **Show Traditional Grades** 3. Enter filter criteria in the field to the right of the pop-up menu. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. To add another filter: 1. Click **+**.

	2. Repeat Step 2 through Step 4. **Note:** The + appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.
Display Settings	Click **District Order** or **Alphabetical** to display the schools in ascending or descending order from the default settings. Arrows appear to display the current order.

5. Click a school name. The Edit [School] Display Settings drawer appears.
6. Use the following table to enter information in the fields:

Field	**Description**
Display and Sort Sections By	Choose a sort order for each course from the pop-up menu: • **Section Period/Day** • **Section Number (sort by Number)** • **Section Number (sort by Course Name)**
Show Standards Pages and Links	Select the checkbox to display standards-specific pages and links in PowerTeacher Pro. Deselect the checkbox to suppress these items.
Show Standards on Assignments	Select the checkbox to display standards for assignments. Deselect the checkbox to suppress standards display on assignments.
Navigation Links Sort Order	Choose a sort order for the navigation links that appear in PowerTeacher Pro from the pop-up menu:

	• **Traditional/Standards** • **Standards/Traditional**
Show Traditional Grade on PowerTeacher Pro Screens	Select the checkbox to display traditional grades in PowerTeacher Pro. Deselect the checkbox to suppress the display of traditional grades.
Copy Settings	1. Select the checkbox to copy the display settings to another school. A list of schools appears. 2. In the **Search** field, enter a search value to limit the number of schools that appear on the list. 3. Click **Manage School Selection**. 4. To copy the calculation settings to another school, select the checkbox next to the school or schools. Deselect the checkbox for the schools that you do not want to copy the settings to.

7. Click **Submit**. The Edit [School] Display Settings drawer closes.

How to Set Gradebook Display Settings at the School

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **Display Settings**. The Display Settings page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Display and Sort Sections By	Choose a sort order for each course from the pop-up menu: • **Section Period/Day** • **Section Number (sort by Number)** • **Section Number (sort by Course Name)**

Show Standards Pages and Links	Select the checkbox to display standards-specific pages and links in PowerTeacher Pro. Deselect the checkbox to suppress these items.
Show Standards on Assignments	Select the checkbox to display standards for assignments. Deselect the checkbox to suppress standards display on assignments.
Navigation Links Sort Order	Choose a sort order for the navigation links that appear in PowerTeacher Pro from the pop-up menu: • **Traditional/Standards** • **Standards/Traditional**
Show Traditional Grade on PowerTeacher Pro Screens	Select the checkbox to display traditional grades in PowerTeacher Pro. Deselect the checkbox to suppress the display of traditional grades.

5. Click **Submit**.

District Categories for Teachers

Categories are groups of the same types of assignments. Create a list of the available grading categories at the District Office. These categories can be made available for teachers at different schools to use when grading. The district sets different category attributes, but some attributes are available for the teacher to set in PowerTeacher Pro. Once categories are created, they appear on the District Categories for Teachers page. This page displays basic information about the category and allows you to set the sort order of how the categories are displayed for teachers in PowerTeacher Pro. The categories also appear in PowerTeacher Pro and are available for teachers to use.

How to Work with Categories for Teachers

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **District Categories for Teachers**. The District Categories for Teachers page appears.

4. Select the **Show Inactive** checkbox to view all active and inactive categories. Deselect the checkbox to hide the inactive categories.
5. Click **Add** to create a category. For more information, see *How to Create Categories for Teachers*.
6. Under the Sort Order column, click the arrows to move categories up or down on the list. The sort order you select will be displayed in PowerTeacher Pro.
7. Under the Category Name column, click on a category to edit the information.

   The remaining columns display information about the category. The **Number of Schools** column displays the number of schools to which the category has been assigned and the number of total schools available.

How to Create Categories for Teachers

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **District Categories for Teachers**. The District Categories for Teachers page appears.
4. Click **Add**. The Create New Category drawer appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for the category (40 characters maximum).
Description	Enter a description for the category.
Color	Select a color to associate with the category from the pop-up menu. The color helps to visually identify assignments associated to this category.
Active	Select the checkbox to make this an active category. Active categories are available for teachers to use. Deselect this checkbox to make the category inactive and unavailable for teachers.
Optional Assignment Defaults	Click the arrow to view the optional default settings for the category. For more information, see *How to Set Default Score Types*.

Search	Enter a keyword or school name in the Search field to filter the list of available schools that appears. The list is automatically filtered based on what you enter in the field. To assign the category to schools, see *How to Assign Category to Schools*.

6. Click **Submit**.

How to Set Optional Assignment Defaults

You can set automatic assignment scoring defaults when you create or edit a category. Teachers still have the option to make their own selections in PowerTeacher Pro, but these defaults allow you some consistency when setting up categories.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **District Categories for Teachers**. The District Categories for Teachers page appears.
4. Click **Add** to add a new category or click the category name to edit an existing category. The applicable Category drawer appears.
5. On the Category drawer, click the arrow next to **Optional Assignment Defaults**. The default selections appear.
6. Use the following table to enter information in the fields:

Field	Description
Default Score Type	Choose the default method by which assignments in this category should be recorded from the pop-up menu: • **Points** • **Percent** • **Grade Scale** • **Collected Only**
Default Scoring	Enter the applicable default scoring in the fields provided.

	Buttons appear that allow you to add additional scoring options, such as **Weight** and **Extra Points**. Assignment setup may involve weighting; however, weighting is not required. Weighting gives particular assignments, whether points, percentage, or letter grades, more value than others when determining final grades. The weight value is used to multiply the points earned and the points possible. Extra Points (available with Default Score Type of Points only) PowerTeacher Pro takes the total sum of Score Entry Points and Extra Points to determine the maximum points available on the assignment.
Publish Assignment	Use the pop-up menu to select when assignments for this category will publish to PowerSchool for Students and Parents portal. Teachers have the option to publish assignments or not in PowerTeacher Pro. If you chose **Days Before Due Date**, enter the number of days the assignment should appear prior to the date that it is due in the **Days Before Due Date** field.
Publish Scores	The checkbox is selected by default. Scores for this category will automatically publish to PowerSchool for Students and Parents portal. Teachers have the option to publish scores or not in PowerTeacher Pro. Deselect the checkbox if you do not want to automatically publish scores for this category.
Default Count in Final Grade	Select the checkbox to have this category count in the final grade by default. Deselect the checkbox to exclude this category from the final grade calculation.

7. Click **Submit**.

How to Assign a Category to Schools

Assign a category to multiple schools to make the category available to the teachers at that school.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **District Categories for Teachers**. The District Categories for Teachers page appears.
4. Select the **Show Inactive** checkbox to view all categories.
5. Click the category name. The Category drawer appears.
6. In the Schools Using This Category section, the schools to which the category is already assigned appear.
7. Click **Edit** to enable checkboxes next to each school name.
8. Enter a keyword or school name in the **Search** field to filter the list of available schools that appears. The list is automatically filtered based on what you enter in the field.
9. Select the checkbox next to the school name for which you want the category to appear. Select the checkbox in the header to select all schools in the list.
10. Click **Submit** to save the school selections. Click **Cancel** to disregard the selections.

How to Delete a Category

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **District Categories for Teachers**. The District Categories for Teachers page appears
4. Select the **Show Inactive** checkbox to view all categories.
5. Click the category name. The Edit drawer appears.
6. Click **Delete**. A confirmation message appears.

How to Manage Categories at the School

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Gradebook Setup, click **District Categories for Teachers**. The District Categories for Teachers [school] page appears.
4. Click **Manage Categories**.
5. Select the checkbox next to a category name to make the category available to teachers at the school. Deselect the checkbox to make the category unavailable.

6. Click a category name. The view District [Category Name] Category drawer opens, providing details on the category, including which schools in the district are using the category. Click the **x** to close the drawer.
7. Click **Submit**.

Grade Calculations

Use these settings to configure a subset of data that administrators can set up for teachers to determine how grades are calculated.

Lock Reporting Term Settings

Use this feature to determine when a reporting term should be locked to prevent teachers from updating grades. The User Role must have the Manage Locked Reporting Term setting enabled. For more information, see *How to Create a User Access Role*.

This feature is intended for PowerTeacher Pro sections only.

How to Set Lock Reporting Terms at the District

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Lock Reporting Term Settings**. The Lock Reporting Term Settings â€“ District Office page appears.
4. Use the Basic Filter to limit the number of schools that appear on the page. Click on a column heading to sort the information in ascending or descending order.
5. Click a school name. The Edit [School] Lock Reporting Term Settings drawer appears.
6. Use the following table to select information on the drawer:

Field	Description
Enable Term Locks	Select the checkbox to enable lock reporting term settings.
Days After Reporting Term	Enter the number of days after the reporting term ends to lock score and grade entry in PowerTeacher Pro. The term is locked at the end of the day. For example: the reporting term ends on June 10. You enter 5 in this field to lock

	the reporting term five days later. The lock engages on June 16 at 12:00 a.m. If this field is left blank, the Lock Reporting Term feature is disabled.
Number of Days to Warn Teachers	Enter the number of days in advance of the lock to notify teachers that a term will be locked. When enabled, a banner message appears in PowerTeacher Pro informing teachers of the impending lock date.
Copy Settings	1. Select the checkbox to copy the lock settings to another school. A list of schools appears. 2. In the **Search** field, enter a search value to limit the number of schools that appear on the list. 3. Click **Manage School Selection**. To copy the lock settings to another school, select the checkbox next to the school or schools. Deselect the checkbox for the schools that you do not want to copy the settings to.

6. Click **Submit**.

How to Set Lock Reporting Terms at the School

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Lock Reporting Term Settings**. The Lock Reporting Term Settings page appears.
4. Select the **Enable Term Locks** checkbox to enable lock reporting term settings
5. Click a school name. The Edit [School] Lock Reporting Term Settings drawer appears.
6. In the **Days After Reporting Term** field, enter the number of days after the reporting term ends to lock score and grade entry in PowerTeacher Pro.
7. In the **Number of Days to Warn Teachers** field, enter the number of days in advance of the lock to notify teachers that a term will be locked.
8. Click **Submit**.

How to Manually Lock and Unlock Sections

Manually lock and unlock sections from the Teacher Schedule page. For more information on the Teacher Schedule page, see *Teacher Schedules*.

Note: The User Role must have the **Manage Locked Reporting Terms** setting enabled. For more information, see *How to Create a User Access Role*.

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. Select the checkbox next to the section you want to manually lock or unlock.
4. Click the arrow next to **Unlock Selected Sections** and make a selection from the menu. The button changes to reflect your selection.
5. Click the button, then choose a date for the setting to expire.
6. Click **Submit**. The icons in the Lock column update to reflect the current state of the section.

Manage Next Year Calculations

Use this optional feature to create a copy of the calculations settings for the next school year during the current year. After completion, change the calculations as needed for the next school year without affecting calculations for the current school year. Note that if this process is used, subsequent changes to the current year calculations will not be migrated to the next year calculations as part of the end-of-year process.

How to Create Next Year's List of Standards Prior to End-of-Year

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Manage Next Year Calculations**. The Create Next Year’s Calculations Prior to End-of-Year page appears.
4. Click **Create Calculations**. A confirmation message appears at the top of the page.

   Note: The next school year must already be created at the District Office in PowerSchool in order to use this feature.

5. Navigate to the Calculation Formulas page (**Start Page > District > PowerTeacher Pro Settings**) and change the **Term** to next year to work with the calculation formulas you just created.

Standards Grade Preferences

Determine the standards grades calculation formula settings for the district and edit the calculation formula for a school.

How to Set Standards Grade Preferences at the District

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under the Course Grade Calculations section, click **Standards Grade Preferences**. The District/School Preferences page appears.
4. Use the following table to enter information in the fields:

Field	Description
Basic Filter	To filter the information that appears on this page, enter search criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **School Name** • **Default Calculation** • **Standards Grades - Teacher Editable** • **# of Scores** • **Most Recent Score Calculation â€“ Teacher Editable** • **Auto-Calculate** • **Use This Metric** • **Calculate Higher Level Standards - Teacher Editable** 3. Enter filter criteria in the field to the right of the pop-up menu. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the

	header displays the fields being used to filter results. To add another filter: 1. Click **+**. 2. Repeat Step 1 through Step 4. **Note:** The + appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

5. On the School Settings column header, click **District Order** or **Alphabetical** to display the schools in ascending or descending order from the default settings. Arrows appear to display the current order.
6. Click a school name. The Edit [School] Final Grade Calculation Settings drawer appears.
7. Use the following table to select information on the drawer:

Field	**Description**
Default Calculation	The assigned calculation formula appears.
Teacher Editable	Select the checkbox if the teacher can edit the calculation formula.
# of Scores	Displays the number of recent scores to include in the calculation. Click **Edit** to change the number.
Teacher Editable	Select the checkbox if the teacher can edit the number of most recent scores included in the calculation.
Auto-Calculate	Select the checkbox to automatically calculate higher level standards grades from lower level standards grades. Deselect the checkbox to remove the auto-calculate feature.

	Note: When this checkbox is selected, PowerSchool determines which parent standards are auto-calculated based on the setting on the Courses page. For more information, see *Edit District Standards.*
Use This Metric	Select the metric to use in the calculation from the pop-up menu. • **Mean (average of the scores)** • **Median (middle score)** • **Mode (most frequently occurring score)** • **Highest (highest score)** • **Specific Weighting (average of the scores, weighted by points possible)** • **Specific Sum (typically used by Middle Years Program)** **Note:** If **Specific Weighting** or **Specific Sum** is selected, the weights are entered on the Courses page. For more information, see *Edit District Standards*.
Teacher Editable	Select the checkbox if the teacher can edit the calculated grade.
Copy Settings	1. Select the checkbox to copy the calculation settings to another school. A list of schools appears. 2. In the **Search** field, enter a search value to limit the number of schools that appear on the list. 3. Click **Manage School Selection**. 4. To copy the calculation settings to another school, select the checkbox next to the school or schools. Deselect the checkbox for the schools that you do not want to copy the settings to.

8. Click **Submit**. The Edit [School] Final Grade Calculation Settings drawer closes.

How to Set Standards Grade Preferences at the School

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.

3. Under the Course Grade Calculations section, click **Standards Grades Preferences**. The Standards Grades Preferences page appears.
4. Use the following table to set the preferences:

Field	Description
Default Calculation	The assigned calculation formula appears.
Teacher Editable	Select the checkbox if the teacher can edit the calculation formula.
# of Scores	Displays the number of recent scores to include in the calculation. Click **Edit** to change the number.
Teacher Editable	Select the checkbox if the teacher can edit the number of most recent scores included in the calculation.
Auto-Calculate	Select the checkbox to automatically calculate higher level standards grades from lower level standards grades. Deselect the checkbox to remove the auto-calculate feature. **Note:** When this checkbox is selected, PowerSchool determines which parent standards are auto-calculated based on the setting on the Courses page. For more information, see *Edit District Standards*.
Use This Metric	Select the metric to use in the calculation from the pop-up menu. • **Mean (average of the scores)** • **Median (middle score)** • **Mode (most frequently occurring score)** • **Highest (highest score)** • **Specific Weighting (average of the scores, weighted by points possible)** • **Specific Sum (typically used by Middle Years Program)** **Note:** If **Specific Weighting** or **Specific Sum** is selected, the weights are entered on the Courses page. For more information, see *Edit District Standards*.
Teacher Editable	Select the checkbox if the teacher can edit the calculated grade.

5. Click **Submit**.

Traditional Grade Calculation Formulas

Determine the traditional grades calculation formula settings for the district and edit the calculation formula for a school.

How to Create Traditional Grade Calculation Formulas at the District

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Traditional Grade Calculation Formulas**. The Traditional Grade Calculation Formulas page appears.
4. Click **Add**. The Create Traditional Grade Calculation Formulas page appears.
5. Use the following table to enter information on the page:

Field	Description
Name	Enter the name of the calculation formula.
Description	Enter a description for the calculation formula.
Schools Search	1. In the **Search** field, enter a search value to limit the number of schools that appear on the list. 2. Click **Manage School Selection**. 3. To set the calculation settings to a school, select the checkbox next to the school or schools. Deselect the checkbox for the schools that you do not want to copy the settings to. 4. Select the **Make the Formula the School Default** checkbox to assign this as the default calculation for the school.
Calculate Overall Class Grade	Deselect the checkbox if you are not calculating overall class grades. Select the checkbox if you are calculating overall class grades. If you select the checkbox, the Terms selection area appears.

<table>
<tr>
<td>Terms</td>
<td>
This section appears if you have selected the Calculate Overall Class Grade checkbox.

Click on a term to expand the list of reporting terms.
To assign a formula to a reporting term, click the Pencil icon next to the reporting term. The Reporting Term drawer appears.
Select if you want teachers to edit this calculation from the pop-up menu. The school default setting appears to the right of the pop-up.

If the default value is Yes, you can select No from the pop-up menu to override the school default setting and not allow teachers to edit the calculation formula and dropped scores.
If the default value is No, you can select Yes from the pop-up menu to override the school default setting and allow teachers to edit the calculation formula and dropped scores.

Deselect the Calculate Overall Class Grade checkbox if you do not want to calculate grades for this reporting term. Select the checkbox to set the formula type for the reporting term.
Select a formula from the Type pop-up menu. Depending on the type selected, additional fields may appear. Select or change the fields to suit the calculation formula.

Reporting Term â€“ When this option is selected, a Term Weighting pop-up menu appears. Select Term Weighting Points to include the grade scale values in the calculation. You must set GPA Points and Term Weighting/Average Final Grade options in order to use this feature. For more information, see Grade Scales.
Standards â€“ When this option is selected, if Mean, Median, Mode, or Highest attribute is selected, the calculation averages all of the standards final grades entered for that student for the selected reporting term. However, if Specific Weight or Specific Sum attributes are selected, the calculation uses the information on the Courses page to determine which standards to include in the

</td>
</tr>
</table>

	calculation. For more information, see *Edit District Standards*. 6. Click the **Drop Scores** tab. Select the scores to drop from the pop-up menus.

6. Click **Submit**.

How to View and Edit Traditional Grade Calculation Formulas at the District

You can filter the class grade calculations page to display specific calculation formulas.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Traditional Grade Calculation Formulas**. The Traditional Grade Calculation Formulas page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Basic Filter	To filter the information that appears on this page, enter search criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following: • **Name** • **Description** 3. Enter filter criteria in the field to the right of the pop-up menu. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results.

	To add another filter: 1. Click **+**. 2. Repeat Step 1 through Step 4. **Note:** The + appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

5. To view traditional grade calculation formula details, click on an item in the **Name** column. The Edit page appears.
6. Edit the fields as needed.
7. Click **Submit**.

How to Set Traditional Grade Calculation Formulas at the School

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Click **Traditional Grade Calculation Formulas**. The Traditional Grade Calculation Formulas page appears.
4. Use the following table to enter information in the fields:

Field	Description
Basic Filter	To filter the information that appears on this page, enter search criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section. To filter by columns: 1. Click **+**. 2. From the first pop-up menu, choose one of the following:

	• **Name** • **Description** 3. Enter filter criteria in the field to the right of the pop-up menu. 4. Click **Apply**. The page refreshes and display filtered results. **Note:** The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results. To add another filter: 1. Click **+**. 2. Repeat Step 1 through Step 4. **Note:** The + appears shaded if all filters have been added. To delete a filter: 1. Click **-** next the filter. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

5. To view traditional grade calculation formula details, click on an item in the **Name** column. The Edit page appears.
6. Edit the fields as needed.
7. Click **Submit**.

Traditional Grade Preferences

Set the traditional grade calculation attributes for each school at the District office.

How to Set Traditional Grade Preferences at the District

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.

3. Under the Course Grade Calculations section, click **Traditional Grade Preferences**. The Traditional Grade Preferences page appears.
4. Use the following table to enter information in the fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Basic Filter</td><td>To filter the information that appears on this page, enter search criteria. If needed, click the arrow to expand this section. Click the arrow again to collapse this section.
To filter by columns:
1. Click +.
2. From the first pop-up menu, choose one of the following:
• School Name
• Calculation Formula
• Teachers Can Edit Calculation
• Teachers Can Edit Drop Scores
• School Formula Overrides Course
• Decimal Places
• Round or Truncate
• Teacher Editable
3. Enter filter criteria in the field to the right of the pop-up menu.
4. Click Apply. The page refreshes and display filtered results.
Note: The Filter (0) header refreshes and displays the number of applied filters. In addition, the header displays the fields being used to filter results.
To add another filter:
1. Click +.
2. Repeat Step 1 through Step 4.
Note: The + appears shaded if all filters have been added.
To delete a filter:
1. Click - next the filter.</td></tr>
</table>

	2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**.

5. On the School Settings column header, click **District Order** or **Alphabetical** to display the schools in ascending or descending order from the default settings. Arrows appear to display the current order.
6. Click a school name. The Edit [School] Traditional Grade Calculation Settings drawer appears.
7. Use the following table to enter information on the drawer:

Field	**Description**
Calculation Formula	The assigned calculation formula appears.
Teacher Can Edit Calculation	Select the checkbox if the teacher can edit the calculation formula.
Teacher Can Edit Drop Scores	Select the checkbox if the teacher can edit a drop score.
Decimal Places	Select the number of decimal places for the calculated grade from the pop-up menu.
Round or Truncate	Select **Round** or **Truncate** from the pop-up menu.
Enable Citizenship	Select the checkbox to allow teachers to enter Citizenship.
Student Grade Scales	Select the box next to the alternate grade scales the teacher will have available to assign to students. These scales differ from the grade scale used for the class.
Copy Settings	1. Select the checkbox to copy the calculation settings to another school. A list of schools appears. 2. In the **Search** field, enter a search value to limit the number of schools that appear on the list. 3. Click **Manage School Selection**. 4. To copy the calculation settings to another school, select the checkbox next to the school or schools. Deselect the

	checkbox for the schools that you do not want to copy the settings to.

8. Click **Submit**.

How to Set Traditional Grade Preferences at the School

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears
3. Under the Grade Calculations section, click **Traditional Grade Preferences**. The Traditional Grade Preferences page appears.
4. Use the following table to enter information on the drawer:

Field	Description
Calculation Formula	The assigned calculation formula appears.
Teacher Can Edit Calculation	Select the checkbox if the teacher can edit the calculation formula.
Teacher Can Edit Drop Scores	Select the checkbox if the teacher can edit a drop score.
School Formula Overrides Course Formula	Select the checkbox if the calculation set at the school overrides this formula.
Decimal Places	Select the number of decimal places for the calculated grade from the pop-up menu.
Round or Truncate	Select **Round** or **Truncate** from the pop-up menu.
Teacher Editable	Select the checkbox if the teacher can edit the calculated grade.

5. Click **Submit**.

Getting Ready for Report Cards

Once teachers have completed their final grades, they indicate which classes have all of their final grade entries completed.

Run the Section Readiness Report to view the final grade verification status of the teachers at your school.

How to Run the Section Readiness Report

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **PowerTeacher Pro Settings**. The PowerTeacher Pro Settings page appears.
3. Under Completed Grades, click **Section Readiness**. The Section Readiness page appears with the list of teachers, their courses, and final grade verification status.
4. To limit the entries that appear, enter filter criteria. Click + to add filter options. To remove a filter option, click - next to the filter. When your filter options are complete, click **Apply**.
5. To re-sort the report results, click the column headings.
6. Use the navigation features at the bottom of the page to scroll through the results.

School Information

The School Information page provides information about the selected school. Use this page to add a new school to the system or to edit information about a school already in the system.

How to Add a School

Once you add a school to the system, you cannot delete it.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.
3. Click **New**. The Edit School page appears.
4. Use the following table to enter information in the fields:

Field	Description
School Name	Enter the school's full name.

School Abbreviation	Enter an abbreviation for the school to be used in PowerSchool.
Is a Summer School	Select the checkbox to indicate that this is a summer school. For more information, see the *PowerSchool Summer School Setup Guide* available on PowerSource.
School Address (Full)	Enter the school's address.
School Address	Enter the school's street address.
School City	Enter the school's city.
School State/Province	Select the school's state from the pop-up menu.
School Postal/Zip Code	Enter the school's postal/zip code.
School Phone Number	Enter the school's phone number including area code.
School FAX Number	Enter the school's fax number including area code.
School Number	Enter the school's number. A maximum of nine digits can be used. Once you enter this number, do not change it. **Note:** States usually assign school numbers.
Alternate School Number	If you wish to use an number other than what is listed above to identify the school, enter the number here. Otherwise, leave blank.
StatePrId	Use only when Schools Interoperability Framework (SIF) is enabled. For more information about SIF, visit PowerSource.

Exclude From State Reporting?	Select the checkbox to exclude this school from state reporting.
Grades	Enter the lowest and highest grade levels at the school. Only historical data in this range of grade levels is used for data such as cumulative GPAs, graduation, and credit. Students at the highest level are affected by the end-of-year process. For more information, see *End-of-Year Process*.
Historical Grade Levels	Enter the range of grade levels from which historical data is pulled, such as cumulative GPAs and graduation credit.
Default Next School	Enter the number of the school where students who graduate from this school will be sent. Otherwise, leave as **0** for none.
Sort Order	Enter the number that indicates the order in which this school appears on school lists and pop-up menus.
When Scheduling, Display Courses From	Use the pop-up menu to choose the school from which you want to view the course list when you create student schedules for next year: • **Current school** • **Next school**: The system only displays courses from the next school for students whom you have indicated a next school.

5. Use the following table to edit information in the fields in the School Administration Information - Principal section:

Field	Description
Name	Enter the name of the school's principal.
Phone Number	Enter the telephone number of the school's principal.

Email Address	Enter the email address of the school's principal.

6. Use the following table to edit information in the fields in the School Administration Information - Assistant/Vice Principal section:

Field	Description
Name	Enter the name of the school's assistant or vice-principal.
Phone Number	Enter the telephone number of the school's assistant or vice-principal.
Email Address	Enter the email address of the school's assistant or vice-principal.

7. Use the following table to edit information in the fields in the School Administration Information - Attendance Secretary section:

Field	Description
Email Address	Enter the email address of the attendance secretary.
Bulletin Email	Enter the email address of the person responsible for including items in the daily bulletin. This address appears on the Daily Bulletin page for users to link to when submitting daily bulletin items.
Email Copies of New Teacher Log Entries To	Enter the email addresses of anyone who wants a copy of new log entries submitted by teachers. Separate multiple entries with commas.

8. Use the following table to edit information in the fields in the School Administration Information - Registrar section:

Field	Description

Name	Enter the name of the school's registrar.
Phone Number	Enter the telephone number of the school's registrar.
Email Address	Enter the email address of the school's registrar.
Notes	Enter any pertinent information you want to communicate. For example, you can enter the registrar's work schedule, alternate contact information, etc.

9. Use the following table to edit information in the fields in the County Information section:

Field	**Description**
County Name	Enter the name of the school's county.
County Number	Enter the number for the school's county.

10. Use the following table to edit information in the fields in the School Fee Information section:

Field	**Description**
Fee Exemption Status	Use the School Fee Information section to indicate the fee exemptions status for all students within the selected school. For more information, see *How to Assign Fee Exemption Status to a Group of Students*.

11. Use the following table to edit information in the Auto Enrollment Program Information section:

Field	**Description**

Special Program Link	Use the Auto Enrollment Program to avoid having to separately enroll each new student into a program if every student enrolled in the school must be enrolled into a specific program. Students are automatically enrolled into the program specified here when they are enrolled into the school. Only a program in which all students in the school participate should be selected. If there are no programs that meet this criteria, the correct option to select is **None Selected**. The available programs that can be selected are those defined in *Special Programs*.

12. Use the following table to edit information in the fields in the School Enrollment Fees section:

Field	Description
Fee Type	Use the School Enrollment Fee section to add, edit, and delete school enrollment fees. For information, see *School Enrollment Fees*.

13. Click **Submit**. The Schools/School Info page displays the new school.

How to Edit School Information

Although you cannot delete a school, you can edit school information.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Schools/School Info**. The Schools/School Info page appears.
3. Click the name of the school in the Schools column that you want to edit. The Edit School page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a School*.
5. Click **Submit**. The Schools/School Info page displays the edited school.

Sign In Page Custom Message

Using the Sign In Page Custom Message page, you can add customized messaging to any of the PowerSchool Sign In pages.

How to Add Sign In Page Custom Messages

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Sign In Page Custom Message**. The Sign In Page Custom Message page appears.
3. Use the following table to enter information in the fields:

Field	Description
Student and Parent Sign In Message	Enter the content of the custom message. In addition to standard text, you can include HTML tags. Once submitted, this message appears on the Student and Parent Sign In page.
Teacher Sign In Message	Enter the content of the custom message. In addition to standard text, you can include HTML tags. Once submitted, this message appears on the Teacher Sign In page.
Substitute Teacher Sign In Message	Enter the content of the custom message. In addition to standard text, you can include HTML tags. Once submitted, this message appears on the Substitute Teacher Sign In page.
Administrator Sign In Message	Enter the content of the custom message. In addition to standard text, you can include HTML tags. Once submitted, this message appears on the Administrator Sign In page.

4. Click **Submit**. A confirmation message appears.

How to Edit Sign In Page Custom Messages

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Sign In Page Custom Message**. The Sign In Page Custom Message page appears.
3. Edit information as needed. For field descriptions, see *How to Add Sign In Page Custom Messages*.
4. Click **Submit**. A confirmation message appears.

How to Delete Sign In Page Custom Messages

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Sign In Page Custom Message**. The Sign In Page Custom Message page appears.
3. Remove all contents from the appropriate field. For field descriptions, see *How to Add Sign In Page Custom Messages*.
4. Click **Submit**. A confirmation message appears.

3rd Party Configuration

Use the following procedure to configure 3rd Party applications, such as Centris Sync or Address Management.

How to Set Up 3rd Party Applications

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Plugins, click **3rd Party Configuration**. The 3rd Party Configuration page appears.
3. Use the following table to enter information in the fields:

Field	Description
Centris Group	To enable, see How to Enable Centris Sync. For more information, see *Centris Sync*.
Address Management	To enable, see *How to Enable Address Management.* For more information, see *Address Management*.

4. Click **Submit**. The District Setup page appears.

Student and Staff

Activities Setup

Create, modify, or delete the activities available to students in PowerSchool. You can also clear the values of the activities field for all students, such as at the end of each school year.

How to Add an Activity

Create an activity so that you and other users can add it to student records as needed. Indicate if the new activity affects all schools on your system or just your school. After adding an activity, you can add it to student records. For more information, see *How to Add or Delete Activities on a Student Record*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Activities Setup**. The Activities Setup page appears.
3. Click **New**. The Edit Activity page appears.
4. Use the following table to enter information in the fields:

Field	Description
Activity Name	Enter the name of the activity.
Student Field Name	Enter the activity's field name. Remember that spelling is important and that you must use underscores (_) rather than spaces between words.
Activity Type	Choose one of the following types of activity from the pop-up menu: • **Academic** • **Athletic** • **Community** • **Music**
Required	Select the checkbox if students are required to participate in this activity.
This Activity Appears For	Select an option to display this activity for only the selected school or all schools on this server.

5. Click **Submit**. The Activities Setup page displays the new activity.

How to Edit an Activity

Changing an activity affects all PowerSchool users for your school or system. It does not change the activity's status on individual records, just the information about the activity on the PowerSchool system. After editing an activity, you can add it to student records. For more information, see *How to Add or Delete Activities on a Student Record*.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Activities Setup**. The Activities Setup page appears.
3. Click the name of the activity you want to edit. The Edit Activity page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Activity*.
5. Click **Submit**. The Activities Setup page appears.

How to Delete an Activity

This action deletes the activity from your school or your system. It also deletes the activity from any student records that indicate participation in the activity.

Important: This action cannot be undone. Contact other users before deleting an activity from the PowerSchool system.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Activities Setup**. The Activities Setup page appears.
3. Click the name of the activity you want to delete. The Edit Activity page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

How to Clear Activities for All Students

Clear the values of the activities field for all students. For example, clear the activities for all students at the end of each school year. This does not remove the activity from PowerSchool. To remove an activity, see *How to Delete an Activity*.

Note: This procedure may only be performed at the school level.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Clear Activities**. The Clear Activities page appears.
3. Select the checkboxes next to the activity for which you want to delete the values for all students in the selected school.
4. Click **Submit**. The System Administrator page appears.

Balance Alert

Using the Balance Alert Setup page, you can define thresholds for students' lunch account balances and fee account balances. If students' account balances go over a set threshold, an alert appears on the student page indicating that the students' accounts are in deficit.

The balance alert also appears in the PowerSchool Student and Parent portal if the **Do not show the lunch balance on parent/student pages if you do not want to display the alert** checkbox has not been selected during district setup. For more information, see *How to Set Up Miscellaneous District Settings*.

The Balance Alert email function automatically sends parents or guardians email messages informing them that their students' accounts are in deficit. For more information, see *Parents*.

How to Set Up the Balance Alert

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under General, click **Balance Alert**. The Balance Alert Setup page appears.
3. Use the following table to enter information in the fields:

Field	Description
[Lunch Balance Alert]	Choose the lunch balance level from the pop-up menu. An email is sent to parents who choose to receive Balance Alert emails.
[Fee Balance Alert]	Choose the fee balance level from the pop-up menu. An email is sent to parents who choose to receive Balance Alert emails.
[Alert Email]	Enter the balance alert text in the field. This message appears in the alert window in the PowerSchool Student and Parent portal along with the balances of lunch and fees.

4. Click **Submit**. The Changes Recorded page appears.

Citizenship Codes

Use this page to create, view, edit, or delete citizenship codes used when grading students. These codes are available in PowerTeacher Gradebook.

How to Add a Citizenship Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Citizenship Codes**. The Citizenship Codes page appears.
3. Click **New**. The Edit Citizenship Code page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Code	Enter the citizenship code.
Description	Enter a description for the citizenship code.
Sort order for display	Use the pop-up menu to choose the sort order to appear on the Citizenship Codes page.

5. Click **Submit**. The Citizenship Codes page displays the new citizenship code.

How to Edit a Citizenship Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Citizenship Codes**. The Citizenship Codes page appears.
3. Click either the code or the description of the citizenship code you want to edit. The Edit Citizenship Code page appears.
4. Edit the information as needed. For field descriptions, see *How to Add a Citizenship Code*.
5. Click **Submit**. The Citizenship Codes page displays the edited citizenship code.

How to Delete a Citizenship Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Citizenship Codes**. The Citizenship Codes page appears.
3. Click either the code or the description of the citizenship code you want to delete. The Edit Citizenship Code page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Class Rank

Use class rank to determine the order of students when sorted by grade point average (GPA). For example, the student with the highest GPA ranks at the top of the class. Since class rank calculates based on GPAs, the appropriate GPA calculation methods must exist before determining class rank.

Create a class rank method to set parameters for calculating the class rank. Use multiple class rank methods with varying settings to determine multiple sets of class rankings. For example, you can rank all current students using one method and then rank all current students plus students who graduated early using another method.

Class rank is calculated either manually or automatically at specified intervals, such as every week or only after grades are stored. Since calculating class rank affects all class rank methods, it is best to avoid creating more class rank methods than necessary.

Note: Though you can edit class rank methods, you cannot delete class rank methods via the Class Rank Settings page. Instead, you must use Direct Database Access to remove the class rank method. For more information, see *Direct Database Export*.

View the results of the class rank calculation using the Class Ranking Report. For more information, see *How to Run the Class Ranking Report*. You can also include class rank data access tags on custom reports and exports. For more information about data codes, see *PowerSchool Data Codes*.

How to Add a Class Rank Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Class Rank Methods**. The Class Rank Methods page appears.
4. Click **New**. The Class Rank Method page appears.
5. Use the following table to enter information in the fields:

Field	Description
Description	Enter a description of the class rank method, such as **Class Rank - Simple GPA**.
GPA Calculation Method	Select from the pop-up menu which GPA calculation method to use when calculating class rank. The GPA calculation method determines what is queried and how grades are calculated.

GPA result is	Select from the pop-up menu how you want to assess the class rank: • **Numeric** - Assesses rank numerically, such as giving the student with the highest GPA the rank of 1. This is the most commonly-used selection. • **Text** - Assesses rank alphabetically, such as giving the student with a GPA of A the rank of 1. Select this option when the GPA method returns a text value. For more information, see *GPA Calculation Methods*.
Only include grades	Select the checkbox to include only grades for courses or sections that count in class rank. **Note:** When selected, the class rank grade results may differ from GPA calculation results. This is the only class rank method setting that returns a result that may differ from the GPA.
Exclude students	Select the checkbox to exclude students that are set as excluded from class rank on the students' Other Information page. Some students may be excluded from class rank because they are enrolled for a short amount of time and should not be ranked amongst longer-term students. For more information about excluding a student from the class rank, see *Other Information*. Deselect the checkbox to override the student exclusion setting.
Include early graduates?	Select the checkbox to include students that graduate early. This checkbox filters students that have already exited the school using an exit code that identifies an early graduation. If selected, you must specify in the next field the early graduation exit code.
Early graduation exit code	If the checkbox in the previous field is selected, enter an exit code that specifies an early graduation.

6. Click **Submit**. The Class Rank Methods page displays the new class rank method.

How to Edit a Class Rank Method

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Class Rank Methods**. The Class Rank Methods page appears.
4. Click the name of the class rank method you want to edit. The Class Rank Method page appears.
5. Edit the information as needed. For field descriptions, see *How to Add a Class Rank Method*.
6. Click **Submit**. The Class Rank Methods page displays the edited class rank method.

How to Recalculate Class Rank

To refresh class rank data, recalculate all class rank methods either manually or at specified intervals.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Class Rank**. The Class Rank Settings page appears.
3. Click **Recalculation Frequency**. The Class Rank Recalculation Frequency page appears.
4. Select at which frequency the class rank should recalculate:
    - **Daily** - Recalculates automatically during the nightly process
    - **Weekly** - Recalculates automatically each weekend
    - **Monthly** - Recalculates automatically once per month
    - **After storing grades** - Recalculates automatically each time grades are stored
    - **Manually** - Never recalculates automatically

      Note: To manually recalculate the class rank, click **Recalculate now**. The class rank recalculates immediately. Once complete, the Changes Recorded page appears.

5. Click **Submit**. The GPA Options Changed page appears.

Comment Setup

Teacher comments are an essential tool for communicating information about a student's achievements and/or behavior.

Setup

If using PowerTeacher Gradebook, you can set up a predefined comment bank and define comment lengths. For detailed information, see *Comment Bank* and *Comment Length*.

Entry

Teacher comments can be entered in PowerTeacher and PowerTeacher Gradebook. In PowerTeacher teacher comments can be entered manually and in PowerTeacher Gradebook, teacher comments can be entered manually or you can use the district's predefined comment banks or your own personal comment bank.

View

Once entered, teacher comments can be viewed in PowerSchool, the PowerSchool Student and Parent portal, PowerTeacher, and PowerTeacher Gradebook.

Comment Bank

Use the comment bank to create and maintain a collection of ready-to-use comments that teachers can then apply in PowerTeacher Gradebook.

Note: The Comment Bank is only available in PowerTeacher Gradebook at this time. For more information about PowerTeacher Gradebook, see *PowerTeacher Gradebook User Guide* available on PowerSource.

How to Create Comments in the Comment Bank

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click **New**. The New Comment page appears.
4. Use the following table to enter information in the fields:

Field	Description
Comment Code	Enter a numeric, alphabetical, or alphanumeric code.
Category	Enter a category to which you want to assign your comment (optional). The comment bank groups the comments by category.

	Note: Categories are not relevant to reports or searches. Comment categories affect only how the comments appear on the Comment Bank page.
Available to	Select an option to display this comment for all schools on this server or only the selected school.
Insert Smart Text	Use smart text to simplify comment entry and personalize standardized comments. Smart text may be inserted into a comment, which will then be auto-populated when the comment is used. For example, rather than entering "Student making steady progress academically," you can personalize the comment by entering "<first name> is making steady progress academically," which translates to "Kate is making steady progress academically." To add smart text to a comment, place the cursor in the **Comment Text** field where you want to add the smart text, and then choose one of the following smart text from the pop-up menu: Student Names • <first name> - translates to PSM_Student.Firstname • <last name, first name> - translates to PSM_Student.LastName, PSM_Student.FirstName • <first name last name> - translates to PSM_Student.Firstname PSM_Student.LastName • <preferred name> - translates to the **Preferred Name** on the Student Info window in PowerTeacher Gradebook; if one has not been entered, it translates to PSM_Student.FirstName. • <last name> - translates to PSM_Student.LastName Pronouns based on PSM_Student.Gender • <he/she> - translates to *he* or *she* • <his/her> - translates to *his* or *her* • <him/her> - translates to *him* or *her* • <He/She> - translates to *He* or *She* • <His/Her> - translates to *His* or *Her*

	• <Him/Her> - translates to *Him* or *Her* The selected smart text then appears within the comment.
Comment Text	Enter the comment text, which can include smart text, hyperlinks and some HTML.

5. Click **Submit**. The Comment Bank page displays the new comment.

How to Edit Comments in the Comment Bank

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the code for the comment you want to edit. The Edit Comment page appears.
4. Edit the information as needed. For field descriptions, see *How to Create Comments in the Comment Bank*.
5. Click **Submit**. The Comment Bank page displays the edited comment.

How to Delete Comments in the Comment Bank

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the code for the comment you want to delete. The Edit Comment page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Delete page appears.

Comment Length

In PowerTeacher Gradebook, teachers may enter final grade comments and standard final grade comments. Using the comment length setting, you can define the maximum number of characters that may not be exceeded when entering a comment in PowerTeacher Gradebook. If comment length is defined at the district level, the setting is applicable to all schools within the district. If the comment length is defined at the school level, it will override the district setting.

Note: Comment length is only available in PowerTeacher Gradebook. For more information about PowerTeacher Gradebook, see *PowerTeacher Gradebook User Guide* available on PowerSource.

How to Define Final Grade Comment Length

Use the following procedure to define the final grade comment length at the district level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Comment Setup**. The Maximum Comment Character Length page appears.
3. Enter the number of characters (up to 2048) allowed in the **Approximate maximum number of characters** field.
4. Click **Save**. A confirmation message appears.

How to Define Standard Grade Comment Length

Note: Standard grade comments are adjusted individually for each standard. For more information, see *Enter Standards*.

How to Define Final Grade Comment Length

Use the following procedure to define the final grade comment length at the school level.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Final Grade Comments section select the **School Level** option and then enter the number of characters (up to 2048) allowed.

   Note: To apply the maximum length defined by the district, select the **Same as district** option. For more information, see *How to Define Maximum Length for Final Grade Comment at District Level*.

5. Click **Submit**. A confirmation message appears.

How to Define Standard Grade Comment Length

Use the following procedure to define the standard grade comment length at the school level.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Standards Comments section select the **School Level** option and then enter the number of characters (up to 4000) allowed.

   Note: To apply the maximum length defined by the district, select the **Same as district standards setup** option. For more information, see *Enter Standards*.

5. Click **Submit**. A confirmation message appears.

Comment Length

In PowerTeacher Gradebook, teachers may enter final grade comments and standard final grade comments. Using the comment length setting, you can define the maximum number of characters that may not be exceeded when entering a comment in PowerTeacher Gradebook. If comment length is defined at the district level, the setting is applicable to all schools within the district. If the comment length is defined at the school level, it will override the district setting.

Note: Comment length is only available in PowerTeacher Gradebook. For more information about PowerTeacher Gradebook, see *PowerTeacher Gradebook User Guide* available on PowerSource.

District Setting

How to Define Final Grade Comment Length

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Comment Setup**. The Maximum Comment Character Length page appears.
3. Enter the number of characters (up to 2048) allowed in the **Approximate maximum number of characters** field.
4. Click **Save**. A confirmation message appears.

How to Define Standard Grade Comment Length

Note: Standard grade comments are adjusted individually for each standard. For more information, see *Enter Standards*.

School Setting

How to Define Final Grade Comment Length

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Final Grade Comments section select the **School Level** option and then enter the number of characters (up to 2048) allowed.

   Note: To apply the maximum length defined by the district, select the **Same as district** option. For more information, see *How to Define Maximum Length for Final Grade Comment at District Level*.

5. Click **Submit**. A confirmation message appears.

How to Define Standard Grade Comment Length

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Grading, click **Comment Setup**. The Comment Bank page appears.
3. Click the **Comment Length** tab. The Maximum Comment Character Length page appears.
4. In the Standards Comments section select the **School Level** option and then enter the number of characters (up to 4000) allowed.

   Note: To apply the maximum length defined by the district, select the **Same as district standards setup** option. For more information, see *Enter Standards*.

5. Click **Submit**. A confirmation message appears.

Entry Codes

Use entry codes to identify the reasons why students enroll in and transfer to your school.

How to Add an Entry Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Entry Codes**. The Entry Codes page appears.
3. Click **New**. The Edit Entry Codes page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Code	Enter the code.
Meaning	Enter a description of the code.
Sort Order	Enter a number to determine the order in which you want the system to display this item relative to other items. The lower the sort order number, the higher the item appears on the **Entry Code** pop-up menu. **Note:** You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the first one created precedes the other. The audience does not affect the sort order.

5. Click **Submit**. The Entry Codes page displays the new code and its meaning. Any authorized user can apply the new code to any student transferring out of your school.

How to Edit an Entry Code

Everyone who enrolls or transfers students will be affected by any changes you make to a code. You may want to discuss changes with other users before making them.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Entry Codes**. The Entry Codes page appears.
3. Click the code or the meaning of the code you want to edit. The Edit Entry Codes page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Entry Code*.
5. Click **Submit**. The Entry Codes page displays the edited code and its meaning. Authorized users can apply the edited code to any student transferring out of your school.

How to Delete an Entry Code

Everyone who manages transfers will be affected by changes you make to a code. You may want to discuss changes with other users before making them.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Entry Codes**. The Entry Codes page appears.
3. Click the code or the meaning of the code you want to delete. The Edit Entry Codes page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Exit Codes

Use exit codes to identify the reasons why students leave your school.

How to Add an Exit Code

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Exit Codes**. The Exit Codes page appears.
3. Click **New**. The Edit Exit Codes page appears.
4. Use the following table to enter information in the fields:

Field	Description
Code	Enter the code.
Meaning	Enter a description of the code.
Sort Order	Enter a number to determine the order in which you want the system to display this item relative to other items. The lower the sort order number, the higher the item appears on the **Exit Code** pop-up menu. **Note:** You can use 0 or negative numbers, such as -1, to precede other entries. If two items have the same sort order number, the

	first one created precedes the other. The audience does not affect the sort order.

5. Click **Submit**. The Exit Codes page displays the new code and its meaning. Authorized users can apply the new code to any student transferring out of your school.

How to Edit an Exit Code

Everyone who transfers students out of your school will be affected by changes you make to a code. You may want to discuss changes with other users before making them.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Exit Codes**. The Exit Codes page appears.
3. Click the code or the meaning of the code you want to edit. The Edit Exit Codes page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an Exit Code*.
5. Click **Submit**. The Exit Codes page displays the edited code and its meaning. Authorized users can apply the edited code to any student transferring out of your school.

How to Delete an Exit Code

Everyone who manages transfers will be affected by changes you make to a code. You may want to discuss changes with other users before making them.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Exit Codes**. The Exit Codes page appears.
3. Click the code or the meaning of the code you want to delete. The Edit Exit Codes page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Family Management

Family Management provides a streamlined approach to creating and understanding family relationships within PowerSchool. Identifying related students and the ability to share data among those students is the goal of family management, which allows schools to enter student data once and share data among family members.

Use family management to identify siblings or other students within the district who share the same demographic and guardian information. Once identified, shared data can be copied without additional data entry. Additionally, edited data can be dynamically updated for all students with the predetermined family relationship.

Family management provides districts with the flexibility to allow family associations across the district, or limited associations within just one school. If the scope of family management is limited to a single school, the student information cannot be associated or shared with students from other schools.

The Family Management function enables the district to:

- Control which student fields are copied from one student to another.
- Limit the scope of student records visible to a school administrator.
- Limit the scope of family associations to only those student records within the same school.

How to Select Student Fields to Copy

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Family Management, click **Family Management**. The Family Management page appears.
3. Use the following table to select information:

Field	Description
Do not allow schools to view and copy from students at other schools	Select the checkbox to not allow schools to view or copy information from a student who is not enrolled in their own school.
Do not allow schools to copy data to students at other schools	Select the checkbox to allow schools to view but not copy information to a student who is not enrolled in their own school.

Available Student Fields to Copy	Displays all student fields including database extensions (legacy custom fields) created for student records. This is a multiple select list; several adjacent fields can be selected simultaneously by clicking on the field and holding the SHIFT key. To select separate fields, press and hold COMMAND (Mac) or CONTROL (Windows) as you click the field names.
Selected Student Fields to Copy	Displays fields that are copied from one student to another when using family management. By default, this column is pre-populated with the most common fields shared by siblings.
Add	Click to add the selected fields in the Available Student Fields to Copy column to the Selected Student Fields to Copy column. Removes the selected fields from the Available Student Fields to Copy column.
Remove	Click to move the selected fields from the Selected Student Fields to Copy column to the Available Student Fields to Copy column.
Remove All	Click to remove all the fields, whether selected or not, from the Selected Student Fields to Copy column and move them back to the Available Student Fields to Copy column.
Load Defaults	Click to display the most common fields shared by siblings.
Reset	Click to reset the list of Student Fields to Copy to the list that existed when the page was first loaded.
Hyperlink numbers and letters	Click a letter or number to view a consolidated list of fields sorted by the selected letter or number.

4. Click **Submit**. The Changes Recorded page appears.

How to Mass Create Family Links

At the district level, the Mass Create Family Links function provides a quick way to establish family relationships between existing students in the district. This function searches for all active and inactive students in the district, all students with active enrollments in the district, or only the selected students.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Functions, choose **Mass Create Family Links**. The Mass Create Family Links page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Use the following table to enter information on this page:

Field	Description
Students to Include	Indicate which students you want to search for by selecting all students with active enrollments, or all active and inactive students in the district.
Search for Match on	Indicate the criteria by which you want to search by selecting **Family ID**, **Student Phone**, or both.

5. Click **Submit**. PowerSchool searches for students who match the criteria. When the search is complete, a message page displays the number of students located in the search and the number of new family management links created.

Next School

Use the Next School Indicator to add, edit, or delete the names of schools identified as "next schools" which are schools that student graduates will attend when they leave your school. Next school selections are made either per student or as a default for all students. For more information about setting the default school, see *Next School Indicator*.

If the next schools share your PowerSchool system, PowerSchool automatically transfers student records to the next school when you use the end-of-year process.

How to Create a Next School Indicator

If there is more than one school that your students often graduate to or move to, you may want to set up additional next schools.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Next School**. The Next School page appears.
3. Click **New**. The Edit 'Next School' Record page appears.
4. Use the following table to enter information in the fields:

Field	Description
School Name	Enter the name of the school.
School abbrev.	Enter the abbreviation for the school.
School number	Enter the school number.
Sort order for display	Choose the sort order on the list of next schools from the pop-up menu.

5. Click **Submit**. The Next School page displays the new school.

Now you and other users can assign it as the next school for any student.

How to Edit a Next School Indicator

There are times when it is necessary to edit a next school record on the PowerSchool system. The changes you make to the next school record apply to the school and not to the students who are assigned to attend that school.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Next School**. The Next School page appears.
3. Click the school name, school abbreviation, or school number to be changed. The Edit 'Next School' Record page appears.
4. Edit the information as needed. For field descriptions, see *How to Create a Next School Indicator*.
5. Click **Submit**. The Next School page displays the changes.

How to Delete a Next School Indicator

If students are no longer continuing on to a particular school that has been set up as a next school, delete that school from the list. Before doing so, it is important to verify that the school is to be removed. Any student assigned to that school is impacted by this change.

1. On the start page, choose **School** under Setup in the main menu. The School Setup page appears.
2. Under Scheduling, click **Next School**. The Next School page appears.
3. Click the school name, school abbreviation, or school number you want to delete. The Edit 'Next School' Record page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Special Program Setup

Use the Special Program page to add, edit, or delete special programs for your district. Additionally, you can view and print a list of special programs or students enrolled in a special program.

Once you have created a new special program, any PowerSchool user with the proper access can add students to that program. To add a student to a special program, see *Special Programs*.

Note: The Special Programs page for Utah schools displays the link **Utah schools click here**. Click the link to display the Utah Special Programs page, which describes state-specific special program information.

How to Add a Special Program

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Special Programs**. The Special Programs page appears.
3. Click **New**. The Special Program Information page appears.
4. Use the following table to enter information in the fields:

Field	Description
Program name	Enter the name of the program.

Qualifies as a special education program	Select the checkbox if the special program is considered a special education program.
Include in Quick Lookup	Select the checkbox to indicate that this special program is to appear in the Attendance by Program grid on the Quick Lookup page. By default, the checkbox is not selected.

5. Click **Submit**. The Special Programs page displays the new program.

   Any authorized PowerSchool user can add students to the program.

How to Edit a Special Program

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Special Programs**. The Special Programs page appears.
3. Click the program name for the program you want to edit. The Special Program Information page appears.
4. Edit the information as needed. For field description, see *How to Add a Special Program*.
5. Click **Submit**. The Special Program page displays the edited program.

How to Delete a Special Program

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Enrollment, click **Special Programs**. The Special Programs page appears.
3. Click the program name for the program you want to delete. The Special Program Information page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Working with Standards in PowerSchool

Before using standards in PowerSchool, understand what your district wants and is expected to report to a board of education, superintendent, or the state Department of Education (DOE). There is no need to define different standards or benchmarks at every grade level if you are not expected to report that information. For example, the Wyoming DOE requires schools to report student progress at the fourth-, eighth-, and eleventh-grade levels. Schools in Wyoming often select to have all teachers match their assignments to only those benchmarks unless their local DOE requires it at every grade level. Kindergarten through fourth-grade teachers can align to the fourth-grade set of benchmarks; fifth- through eighth-grade teachers can align to the eighth-grade set; and so on.

Important: If each grade level does use and report on different standards, then standards should be created by grade level.

Grading Methods

The conversion scales are applied in the grading methods listed in the following table. In specialized cases, these methods need special values in order to translate into a different scale.

Grading Method	Description
Values and Cut-offs	This is the main way that alphanumeric scales work. Every letter has a grade value. Those values are averaged together then the cut-off is used to determine the final grade. For example: A = 100, B= 80. Student has A, A, B (value = 100, 100, 80). Average = 92.5%. The cut-off for A is 90, so the final grade is A. There are two scenarios where a numeric scale uses a value and cut-off.
Basic Numbers	This is the main way that numeric scales work. Basic numbers have no special values. For example: 4, 4, 3, 3 = 4, 4, 3, 3. Average = 3.5. There are two scenarios where a numeric scale does not use basic numbers. In order to calculate the grade correctly, you create Translation Values.

Standards Scenarios

The grade scales calculation in PowerTeacher Pro is dependent on the preferences the teacher has set on the Standards Grades Calculations page in PowerTeacher Pro.

If no calculation preferences are set:

Standards Scenario	Alphanumeric Scale	Numeric Scale
Using assignment standard scores to calculate the final standards grade.	Uses values and cut-offs to calculate the final standards grade. Every letter has a grade value. The grade values are added, then the cut-off is used to determine the final grade.	Uses basic numbers with no special values.

If preference is set to calculate the higher level standards grades from lower level standards grades:

Standards Scenario	Alphanumeric Scale	Numeric Scale
Rolling up standards final grades to the higher level standards, when all lower level standards have the same scale.	Uses values and cut-offs to calculate the final standards grade. Every letter has a grade value. The grade values are added, then the cut-off is used to determine the final grade.	Uses basic numbers with no special values.
Rolling up standards final grades to the higher level standards, when some of lower level standards have different types of grade scales.	Uses values and cut-offs to calculate the final standards grade. Every letter has a grade value. The grade values are added, then the cut-off is used to determine the final grade.	Uses the grade value and cut-off to use the values and cut-offs grading method.

If preference is set to allow assignment scores to auto-calculate the assignment standards scores:

Standards Scenario	Alphanumeric Scale	Numeric Scale
Pushing scores from the assignment to the standards scores.	Uses values and cut-offs to calculate the assignment standard scores. Every	If the same scale is used for the section's traditional grade as well as the

	letter has a grade value. The cut-off is used to determine the assignment standards score.	standards being assessed, then basic numbers with no special values are used. If however the scales differ, then the translation values and cutoffs are used.

Standards Calculation Measures

Here are five example scores, an explanation of each calculation option, and a discussion of when each option might be a good or a bad choice for your class.

Example Score	Calculation Method	Calculation Score Result
Scores on five assignments: 2, 3, 3, 3, 4	Mean (average of the scores)	3
	Weighted Mean (average of the scores, weighted by points possible)	3 (but depends on the weighted points possible for the assignments)
	Median (middle score)	3
	Mode (most frequently occurring score)	3 **Note:** When there is more than one mode, this score will be blank.
	Highest (highest score)	4
	Most Recent (average of the most recent scores)	Most Recent 1 score: 4 Most Recent 2 scores: 3.5 (average of 3 and 4) Most Recent 3 scores: 3.33 (average of 3, 3, and 4) You can also set a weight for each of the most recent

		scores on the Preferences dialog. For example, set the most recent calculation to use the last 3 scores. You want the most recent to be 50%, and the 2 before to each be 25% of the calculation. You can also set a weight for each of the most recent scores on the Preferences dialog. For example, set the most recent calculation to use the last 3 scores. You want the most recent to be 50%, and the 2 before to each be 25% of the calculation.

Every measure has times when it is valuable, and times where it may not be the best measure for your class.

Calculation Method Description

The following table lists the calculation methods available.

Calculation Method	When to Use It	When Not to Use It
Mean	When you have equally important scores at each period of time, and the learning is not cumulative. For example, in History, final unit test scores on unit 1, unit 2, and unit 3 may all be independent. In that case, using the mean (or	When students are introduced to a new concept and the learning is cumulative over time. For example, students start out not understanding a concept, but over the term they get it. Averaging their initial scores (where they were unfamiliar with the work) with their final

	average) could be a good choice.	attempts (when they understood the concepts) may not be the best measure. For example, consider the following scores: 20%, 30%, 40%, 95%, 100%. In this case, the student likely did not understand the concept at the beginning, but by the end they got it. The average here is 57%, which may not be the most reflective of their proficiency at the end of the term.
Weighted Mean	The weighted mean is better than the mean when assignments with high weighted points possible should be counted more heavily.	When all standards scores are valid indicators of performance, the teacher may not care about the specific points possible. This is especially true if there are high point value assignments from early in the semester, and the students have grown tremendously since that time.
Median	When you have multiple data points, and students have been given lots of chances to demonstrate mastery. It allows the student to overcome their initial attempts when they don't understand at the beginning, because only the middle score is used. Some people consider this one of the most consistent	When there are only a few data points. In that case, the middle number can simply be luck. Or, when the learning is cumulative, where the students know much more at the end of the term, and their proficiency is significantly better across the board than at the start. For

	measures of performance. This measure throws out high and low outlying scores. For this reason, housing price data is usually listed in terms of the median sales price. There are extremes at either end that can skew average.	example, consider the following scores: 20%, 30%, 40%, 95%, 100%. In this case, the student likely did not understand the concept at the beginning, but by the end they got it. The median (or middle number) here is 40% and may not be the most reflective of their proficiency at the end of the term.
Mode	When you have a small range of possibilities. For example, when using letter grades A,B,C,D,F, or a 1-4 scale, there are only a limited range of score options. If a student's scores are A, D, A, B, A, the most frequently occurring value is A.	When there are multiple possible scores, and it is unlikely for the exact score to be consistent. For example, this is not a good measure for percentage scores. Example percentage scores: 90, 91, 25, 100, 99, 81.5, 98, 97, 25, 96, 94. In this data, the mode is 25%. The average is 81.5%. The median is 94%.
Highest	When the student's highest level of demonstrated proficiency is a good indicator of what they know and can do. When assessments are in-depth and highly reliable. In these cases, many districts believe that the student's highest score is a good indicator.	When the highest score could be based on chance or lucky guessing. For example, on multiple choice tests, the student could have guessed right on several questions by chance, boosting their highest score. For example, one student's results for one standard assessed on 5 multiple choice tests were as follows: 70, 95, 70, 70, 70. Although the student did

		get a 95 once, this score may not be the best reflection of the student's actual level of proficiency on this standard.
Most Recent	When the learning is cumulative, and the students will demonstrate a much higher level of proficiency at the end of the term than at the beginning. In these cases, it makes sense to focus on the most recent scores as a reflection of the student's proficiency.	When some of most recent scores themselves are anomalies. For example, if a student recently was very ill, or experienced some other phenomenon, then the most recent scores may not be reflective of their actual proficiency. This is usually assessed student by student to determine if the most recent scores are accurate. It can also happen when the most recent assessment is not as detailed or reliable as earlier assessments, or there were other distracting factors. For example, students have lots of good quizzes and a unit test with reliable data. That was followed by in-class review worksheets. Half of the students were distracted completing them because there was construction going on outside. In this case, the most recent data may not be the most reflective.
Specific Weight	Values entered in the weight field for standards related to the course are	If you want to weigh all of the standards assessed by

	used to determine which standards grades will be averaged to produce the course grade as well as how much each standard grade will be weighted in that calculation.	the student to determine a final grade. For calculating a final standards grade, you want all direct child standards to calculate to the parent. For calculating a final traditional grade from standards, you want all standards assessed for the student to be included in the calculation.
Specific Sum	For use with numeric grade scales. Values entered in the weight field for standards related to the course are used to determine which numeric standard grades will be summed to produce a numeric course grade, as well as how many times they will be counted. For example: The course standard has a weight of 2, numeric value of the standard grade is 3, sum value for that standard grade is 6. Course or section grades scales will often allow higher numeric values than those assigned to the standards being summed to allow for more meaningful summed totals. For example: A standard has a numeric 1-4 grade scale. The related course where the grade is being summed might have a 1-20 numeric	You do not want to have a separate scale where specific summed standards grades are evaluated against a larger maximum range.

	grade scale so that up to 5 standard grades can be summed into the course grade for a maximum course grade of 20.	

Important Usage Note: In PowerTeacher Pro, you can mark any score as Exempt. If a student was sick during the last quiz, you can exempt this score. The most recent calculation will then ignore that score and use the previous score. In this manner, you can use the most recent scores, while still exempting any scores that are not good reflections of the student's learning.

How Do I Determine the Standards Final Grade for the Marking Period?

The default calculation method is used as a starting point. However, as described above, sometimes these measures work very well, and other times there are reasons to prefer a different calculation. The default calculation is a good starting point. However, the teacher should review the standards scores above, and review the calculations in the summary area below. Then the teacher can determine if the calculated score is correct for the report card for this student, or if they want to choose a different grade on that standard for that student.

Here are two examples, both of which start with the default calculation of the highest score for the final standards grade.

Student 1

- Scores: 3,3,3,4,4,4,4,4,4,4
- Highest = 4
- Final Grade Decision on this standard: For this student, 4 is probably a good choice for the final grade on this standard. No change or further work needed.

Student 2

- Scores: 2,2,4,2,1,2,2,2,2,2,2,2,2,2
- Highest = 4

Final Grade Decision on this standard: For this student, it would be good to know more about the time they got a 4. Likely, the teacher will want to change the standard final score on the report card from 4 to 2. Two is the median, mode, approximate average, and the most recent score. With this data, 2 appears to be a more accurate representation of the student's actual proficiency level on this standard than 4.

Standard Conversion Scales

Create conversion scales to be used with PowerTeacher Gradebook that can be assigned to standards to determine the standards final grades and standards assignment scores. PowerTeacher Pro does not use conversion scales. However, if a teacher is switching from PowerTeacher Gradebook to PowerTeacher Pro in the middle of the term length of a class, then it is imperative that the standards assigned to the course have a conversion scale and a grade scale that match, and that are tied directly to those standards. This will ensure that the data migration works correctly.

How to Create a Conversion Scale

Before entering standards, you must first create at least one conversion scale.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Conversion Scales**. The Standard Conversion Scales page appears with the default scale already created. However, you must define each scale and enter the cutoffs for each level and for the converted score.

   Note: It is advantageous to leave a default scale in your system for importing purposes.

4. Click **New**. The New Standard Conversion Scale page appears.
5. Use the following table to select the grade scale type:

Type	Description
Name	Enter a name for the standard conversion scale.
Type	Choose a grade scale type from the pop-up menu: • **Alphanumeric:** Use for letter grades such as A, B, and C or E, S, and N, or descriptive grades such as Excellent, Satisfactory, and Unsatisfactory. • **Numeric (2 decimal places):** Use for GPA-type grades such as 4.00, 3.00, and 2.00. • **Numeric (zero decimal places):** Use for simple numerical grades such as 1, 2, 3, and 4.

	• **Numeric (custom)**: Use for custom numeric grades such as a 4,3,2,1 scale where teachers are allowed to enter decimal scores like 3.5.
Min	Enter the minimum numeric value allowed. Based on the Min and Max numbers you enter, PowerSchool will automatically populate the range of numeric values along with the applicable cut-off and grade values. **Note**: This field appears when **Numeric** is selected on the Type pop-up menu.
Max	Enter the maximum numeric value allowed. Based on the Min and Max numbers you enter, PowerSchool will automatically populate the range of numeric values along with the applicable cut-off and grade values. **Note**: This field appears when **Numeric** is selected on the Type pop-up menu.
Decimal Places	Enter the number of decimal places allowed. **Note**: This field is editable when **Numeric (custom)** is selected on the Type pop-up menu.
Description	Enter a description.

6. Click **Submit**. The Standard Conversion Scales page appears.

   Note: Enter as many conversion scales as needed for the district.

How to Add or Edit Conversion Scale Attributes

After defining the conversion scale, you can edit the scale attributes.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Conversion Scales**. The Standard Conversion Scales page appears.

4. Click on the Edit Scale link of the scale you want to modify. The Edit Scale page appears.
5. To add an attribute to this scale, click **New**. To edit an existing attribute, click the Number/Level or Grade/Label hyperlink.
6. Use the following table to enter information in the fields:

Type	Description
Name	The name of the conversion scale appears
Type	Displays a description of the standard conversion scale entry.
Number/Level or Grade/Label	In a numeric scale, displays the number/level as a hyperlink. In an alphanumeric scale, displays the grade/label as a hyperlink.
Description	Displays the description for the number or grade.
Cut-off	Displays the cut-off percentage. This is the minimum a student must earn on an assignment to receive this grade. In a numeric scale, this value is used as a translation value when other values are translated into this scale.
Grade Value	Enter the percentage used for calculations when this grade is entered as an assignment score. In a numeric scale, this value is used as the percentage when calculating the number/level as an assignment score.

7. Click **Submit**. The Edit Scale page appears.

   Note: Enter as many conversion scale attributes as needed for the conversion scale.

Custom List

The Custom List displays standards in a hierarchical list.

How to Set Up the Custom List

After defining the conversion scale, you can edit the scale attributes.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Custom List Settings**. The Custom Standards List Settings page appears.

   Note: Use the list settings to search for a particular standard by multiple criteria. However, after you submit the search, enter new standards using the criteria defined by your search.

4. Use the following table to select a search comparator:

Comparator	Description
(Blank)	Ignore this field.
=	Must be an exact match.
#	Must not be an exact match.
$	Contains.
!$	Does not contain.

5. Use the following table to search for a standard:

Field	Description
Identifier	Enter the code used by administrators for reporting and by teachers for designating to assignments. Must be unique.
Name	Enter the name of the standard.
Level	Select the level identifier from the pop-up menu.

Active Status	Select the standard's active status from the pop-up menu.
Course Numbers	Enter course numbers separated by commas.
Subject Area	Enter the global naming convention for the subject area for the standard.
Description	Enter a description of the standard.
Conversion Scale	Select a previously defined conversion scale from the pop-up menu.
Grade Scale	Select a grade scale from the pop-up menu.
Teachers Score this Assignment	Do one of the following: • Select **Yes** to include standards that you have marked for teachers to score. • Select **No** to exclude those standards.
Exclude From Reports	Do one of the following: • Select **Yes** to include those standards in the custom list that you have marked for exclusion from reports. • Select **No** to exclude those standards in the custom list that you have marked for exclusion from reports.
Sort Order	Select the sort order from the pop-up menus. This defines how the search results appear on the page.
Columns to Show	Select one or many check boxes to define what the search results display.

6. Click **Submit**. The Custom Standards List page appears.

   After searching for the specific criteria, the results of your search appear; however, the results can be blank.

How to View the Custom List of Standards

After you have defined you custom list settings, you can use this page to view your custom list, create new standards, and edit existing standards.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Custom List**. The Custom Standards List page appears.
4. Click **New** to create a new standard. For more information, see *How to Manually Enter Standards*.
5. To view and edit standards, click on the name of the standard. For more information, see *How to View and Edit Standards*.
6. To search for standards:

    a. In the **Search** field, enter a standard name or identifier, and then click **Apply**. Standards matching the search criteria appear on the page.
    b. Click **Clear** to remove the search entry.
    c. Click the triangle next to **Filter** to collapse the search field.
7. To filter the custom list of standards by school year, click **Term** in the navigation menu, and make a selection from the pop-up menu. The page refreshes with the standards assigned to the selected school year.

Standards Data Access Tag (DAT) Formatting

Set up the formatting for the following Standards DAT used in PowerSchool:

- std.stored.avg
- std.stored.high

For more information on standards DAT, see the *PowerSchool Data Access Tags Supplement* guide, available on PowerSource.

How to Set Up Standards DAT Format

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Standards Data Access Tag (DAT) Formatting**. The Standards Data Access Tag (DAT) Formatting page appears.

4. In the **Number of decimal places in percent scores** field, enter the number of decimal places to be used when percent scores are present (for example, 3).
5. Select the **Include "%" character in percent scores** checkbox to include the percent character when percent scores are present (for example, 89%). Otherwise, leave the checkbox blank.
6. Click **Submit**.

Manage Next Year

Use this optional feature to create the list of standards for the next school year during the current year if you have finalized the standards names and hierarchy. After completion, change the names and hierarchy of standards for the next school year as needed without affecting standards for the current school year. Note that if this process is used, subsequent changes to the current year standards will not be migrated to the next year standards list as part of the end-of-year process.

If you do not use this feature, standards will be automatically created for the next school year as part of the end-of-year process based on the names and hierarchy in place when the end-of-year process is engaged.

How to Create Next Year's List of Standards Prior to End-of-Year

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **Manage Next Year**. The Manage Next Year page appears.
4. Click **Create Standards List**. A confirmation message appears at the top of the page.

   Note: The next school year must already be created at the District Office in PowerSchool in order to use this feature.

5. Navigate to the List Standards page (**Start Page > District > Standards**) and change the **Term** to next year to work with the standards you just created.

   Note: You can also create the calculation formulas for the next school year prior to the end-of-year process. For more information, see *Grade Calculations*.

Work with Standards

After setting up conversion scales, you can begin entering standards manually or through an import.

Note: Importing is the easiest way to enter standards into PowerSchool. For more information, see *Quick Import*.

How to Manually Enter Standards

Complete this procedure for each standard you want to enter manually.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **List Standards**. The list of standards appears. The list is based on the selected term.
4. Click **New**. The Create Standard drawer appears.
5. Use the following table to enter information in the fields:

Field	Description
Year	Displays the currently selected year.
Name	Enter the name of the standard. This information is used for reporting purposes.
Identifier	Enter a unique code for designating this assignment.
Parent Standard	Enter a hierarchical identifier that always identifies the owning standard. This identifier controls how the hierarchy displays in PowerTeacher Gradebook. As you type, a pop-up appears allowing you to select the correct parent standard from a list.
Sort Order Within Parent	Enter a sort order for the standard, used to determine non-alphabetical ordering.
Level	Displays the current sort order based on the parent standard.
Is Active	Select the checkbox to make this standard active for the selected year.

Description	Enter a description of the standard. This field is used for reporting purposes only.
Courses	Enter the courses associated with this standard. You may also paste a comma-delimited list into this field. As you type, a pop-up list appears allowing you to select the courses you want to associate with this standard. You may select multiple courses to associate with this standard.
Subject Area	Enter the subject area for this standard.
Conversion Scale	Select a conversion scale from the pop-up menu. **Note:** Each standard can have only one conversion scale. **Note:** Conversion scales are not used with PowerTeacher Pro.
Grade Scale	Select a grade scale from the pop-up menu.
Teacher Scores this Standard	Select the checkbox to allow a teacher to enter scores for this standard in PowerTeacher Gradebook.
Include Comments	Select the checkbox to include a comment field for school-specific standards.
Max Length	Enter the maximum number of characters (up to 4000) that may be allowed when entering a comment for school-specific standards. If Include Comments is not selected, this field does not appear. **Note:** If defined at the district level, the setting is applicable to all schools within the district. If defined at the school level, the school setting overrides the district setting.
External ID	For use with a universal ID which connects to content and other systems, such as Academic Benchmarks.

Exclude From Reports	Select the checkbox to exclude this standard from reports. This setting is honored in the new Standard object in Object Reports. For more information, see Object Reports.

6. Click **Submit**. The Standards page appears.

How to View and Edit Standards

View standards in a hierarchical listing.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Standards**. The Standards page appears.
3. Click **List Standards**. The list of standards appears. A list of standards for the selected term appears.
4. In the navigation menu, click **Term**, and select a different term from the pop-up menu to view standards associated with that year.
5. Click the triangle next to **Filter** to search for standards:
   a. In the **Search** field, enter a standard name or identifier, and then click **Apply**. Standards matching the search criteria appear on the page.
   b. Click **Clear** to remove the search entry.
   c. Click the triangle next to **Filter** to collapse the search field.
6. Click the triangle next to a standard to display the first level of standards in each type. Continue clicking the triangle to expand the list. Alternatively, click **Expand All** to expand all levels. Click **Collapse All** to collapse all levels.
7. Click the name of a standard to view details. The Edit Standard drawer appears.
8. Edit information in the fields. For more information, see *How to Manually Enter Standards*.

   Note: If the selected term is for a previous year, the information is read-only.

9. Click **Submit** to save your changes or click the x in the upper right corner to discard changes and close the drawer. The Standards page appears.

Student Numbers

Manage Student Numbers

Using the Manage Student Numbers page, you can view statistical information about student numbers, as well as update student number ranges for all schools in the district.

Note: Updating student number ranges affects Quick Import, Manual Student Enrollment and REST-API Student Enrollment automatic student number generation.

How to Manage Student Numbers

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Student Numbers**. The Manage Student Numbers page appears.
3. Use the following table to view information in the Student Number Statistics fields:

Field	**Description**
Student Number Range	The difference between the smallest and largest student ID numbers.
Available Student Numbers From Last Assigned	The range of student ID numbers that still may be assigned.
Last Assigned Student Number	The last student ID number within range that was assigned.
Remaining Student Numbers	The total number of student ID numbers within the range that may still be assigned.
Total Assigned Student Numbers	The total number of student ID numbers within the range that have been assigned.

4. Use the following table to enter information in the Manage Student Number Ranges fields:

Field	**Description**

Student Number Low	Enter the smallest student ID number within the range.
Student Number High	Enter the largest student ID number within the range. **Note:** The largest value you may enter is 2,147,483,647.

5. Click **Submit**. The Changes Recorded page appears.

Assign Student Numbers

Assign new student ID numbers to a group of students. If you import student numbers from a different system and want to change those numbers in PowerSchool, use this procedure.

Important: This process is not reversible.

How to Assign New Student Numbers

1. On the start page, select a group of students.

   Note: Depending on the selection method used, the Group Functions page appears either immediately or after selecting students from the Student Selection page.

2. Click the PowerSchool logo. The PowerSchool start page appears.
3. Choose **System** under Setup in the main menu. The System Administrator page appears.
4. Click **Assign New Student Numbers**. The Assign New Student Numbers page appears.
5. Enter the starting number from which you want the system to assign student numbers in the **Student numbers are generated from this value** field.
6. Click **Submit**. The Operation Completed page appears.

   Note: If the system displays the alert that some duplicates were found, click **Back** and start the student numbering from a different number.

Test Scores Setup

Test scores are scores associated with a particular test. Use the test score fields when entering scores for individual students. Before creating test scores, identify or create the appropriate test. For more information, see *Tests Setup*.

How to Create a Test Score

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **Edit Scores** next to the test you want to edit. The Test Scores: [Test Name] page appears.
4. Click **New**. The New Test Score: [Test Name] page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the test score
Sort Order	Indicate the order for the test score. **Note:** Alternatively, leave the Sort Order field blank and set the sort order from the Test Scores: [Test Name] page. For more information, see *How to Edit a Test*.
Description	Enter a description for the test to appear on the Test Scores page.

6. Click **Submit**. The Test Scores: [Test Name] page displays the new test score.

How to Edit Test Scores

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **Edit Scores** next to the test you want to edit. The Test Scores: [Test Name] page appears.
4. Skip to Step 6 to edit a test score. To change the sort order of the test scores, enter the order of each test scores in the Sort Order fields.
5. Click **Submit**.
6. Click the score name for the test score you want to edit. The Edit Test Score: [Test Name] page appears.
7. Edit the information as needed. For field descriptions, see *How to Create a Test Score*.
8. Click **Submit**. The Test Scores: [Test Name] page displays the edited test score.

How to Delete a Test Score

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **Edit Scores** next to the test. The Test Scores: [Test Name] page appears.
4. Click the score name for the test score you want to delete.
5. Select the checkbox at the end of the warning note.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

Tests Setup

Before entering test scores for an individual student, create new tests that are available to all the schools on your system. If the test already exists on your system, you can edit test information, such as its description or the sort order of test scores.

How to Create a New a Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click **New**. The New Test page appears.
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the test.
Type	Choose the level of the test from the pop-up menu.
Description	Enter a description for the test that appears on the Test Scores and student pages menus.

5. Click **Submit**. The Test Scores page displays the new test. To add test scores, see *How to Create a Test a Score*.

How to Edit a Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Grading, click **Tests**. The Test page appears.
3. Click the name of the test you want to edit. The Edit Test page appears.
4. Edit the information as needed. For field descriptions, see *How to Create a New a Test*.
5. Click **Submit**. The Test Scores page displays the edited test. To add test scores, see *How to Create a Test Score*.

How to Delete a Test

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Grading, click **Tests**. The Test page appears.
3. Click the name of the test you want to delete. The Edit Test page appears.
4. Select the checkbox at the end of the warning note.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

System Settings

Use the System Settings page to specify preferences and process functions related to your PowerSchool server, including:

- *Centris Sync*
- *Customizations*
- *Data Validation*
- *Email*
- *Global API/SIF Settings*
- *Global Server Settings*
- *Google Analytics*
- *Gradebook Launch Installers*
- *Mime Types*
- *Plugin Management Configuration*
- *PowerSchool Diagnostics*
- *Reporting Engine*
- *Reset Server*
- *Scripts*
- *Security*
- *Select Student Options*
- *Server Array Settings*
- *Server Licensing*
- *Server Settings*

- *Server Statistics*
- *Server Tools*
- *Styles*

Customizations

When updating PowerSchool, you can prevent the update process from overwriting custom pages. Enabling customization allows you to save custom pages in an existing custom web_root directory at PowerSchoolPremier/data/custom/web_root. The custom web_root directory contains the same folder structure as the stock, non-custom PowerSchool web_root at PowerSchoolPremier/resources/web_root.

To use custom pages and files, enable customization and store your custom pages and files in the appropriate subdirectory of the custom web_root. When PowerSchool retrieves a page or file to display, it first checks the custom web_root directory and directory structure. If found in the custom web_root directory, the custom page loads. If it is not found in the custom web_root directory, the page or file loads from the standard PowerSchool web_root directory. Disable customization to ignore the custom web_root directory and simply load pages and files from the standard PowerSchool web_root directory.

Note: Any custom page placed in the standard web_root will be overwritten when you update PowerSchool. Be sure to store such pages in the custom web_root.

Updating PowerSchool may cause the standard and custom web roots to differ in structure. For example, if a folder related to new functionality is created in the standard web_root when updating the core PowerSchool application on your server, a folder of the same name in the same location needs to be created in the custom web_root before you can store any custom pages related to that new function. If necessary, manually add or remove folders from your custom web_root to mirror the standard web_root.

If you need to restore your custom web_root directory structure, download and install the same version of PowerSchool you are currently using from the Downloads area of PowerSource. You will need your username and password to sign in. If you do not have this information, see your System Administrator. When running the installer, choose the **Update** option to refresh the custom web_root directory structure.

You can also use the Customization page to manually refresh the index of your custom pages.

How to Enable Customization

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.

3. Click **Customization**. The Customization page appears.
4. Select the **Customization Enabled** checkbox to prevent overwriting custom pages on your server when updating PowerSchool.
5. Click **Synchronize Custom web_root** to manually synchronize the custom pages with the Web root folder on your server. The page refreshes.
6. Click **Submit**. The System Settings page appears.

How to Disable Customization

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Customization**. The Customization page appears.
4. Deselect the **Customization Enabled** checkbox.

   Note: If you have installed a plugin that requires customizations to be enabled, deselecting the checkbox will also disable the associated plugin. For more information, see *Enable Plugins*.

5. Click **Submit**. The System Settings page appears.

Data Validation

PowerSchool can validate data when submitting date and alphabetical field values. Data validation ensures that the day, month, and year for a date field is within a valid range and that an alphabetical field does not contain characters with ASCII codes between and including 1 and 31. If an invalid date is entered, PowerSchool sets the date to 00/00/00. If an invalid character in an alphabetical field is entered, PowerSchool deletes that character.

Note: In addition to enabling basic date validation, PowerSchool also recommends configuring field-specific data validation rules using *Data Validation Configuration*.

How to Set Up Data Validation

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Data Validation**. The Data Validation page appears.
4. Use the following table to enter information in the fields:

Field	Description

Data Validation Disabled	Select the checkbox to disable data validation.
Send Messages to Log Window	Select the checkbox to send information regarding invalid values to the server log window.
Year: Lower Limit	Enter the lower limit for the years considered to be valid. The default value is 1930. **Note:** If you set the lower limit to a value greater than 2000 or less than 0, the default value 1930 is used for the lower limit.

5. Click **Submit**. The System Settings page appears.
6. Restart PowerSchool for the changes to take effect.

Enable Scripts

Various scripts can run when PowerSchool is restarted on your system. In the folder /powerschool/system/server/resources/script/startup, several subfolders contain scripts, including the folders /user and /USA_[state], as well as /global. On the System Settings page, you can enable the scripts in the /global subfolder to run upon system restart.

How to Enable Scripts

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Scripts**. The Scripts page appears.
4. Select the **Global Scripts Enabled** checkbox to run scripts at startup.
5. Click **Submit**. The System Settings page appears.

Google Analytics

Use this page to accept or decline enabling Google Analytics on the PowerSchool server.

Using Google Analytics, PowerSchool will collect certain non-personally identifiable data from end-user browsers related to navigation and use patterns of PowerSchool users for the purpose of improving PowerSchool.

Read the license agreement on the page for information on the type of data collected by Google Analytics. You can opt to enable or disable the feature on the PowerSchool server.

How to Enable or Disable Google Analytics

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Google Analytics**. The Google Analytics page appears.
4. Read the license agreement that appears on the page.
5. Do one of the following:
   - Choose **Do not share my usage data** to disable Google Analytics for the entire district. Select this option if this is a test server.
   - Choose **Share my usage data to help improve PowerSchool** to enable Google Analytics for the entire district.
6. Click **Submit**.

   If Google Analytics is enabled, PowerSchool will send anonymous information to Google to track the pages users have visited.

PowerSchool Diagnostics

Using the PowerSchool Diagnostics page, you can enable performance-profiling tools useful for diagnosing where processing time is spent in PowerSchool.

How to Set Up PowerSchool Diagnostics

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **PowerSchool Diagnostics**. The PowerSchool Diagnostics page appears.
4. Use the following table to enter information in the fields:

Field	Description
PerfCapture enabled? (overrides below settings if off)	Select the checkbox to enable the PerfCapture performance-profiling tool. If enabled, PerfCapture will increase the size of the PowerSchool log files, which places additional load on the system. **Note:** Enabling this option will take immediate effect on this server. On other servers in the array, there may be some delay based on server activity.

Output Transcript logs at level (lower increases impact)	If enabled, PerfCapture will include transcript log information in the PowerSchool log files, which places further load (greatest impact on log file size) on the system. To enable, indicate the level detail you want included in the transcript logs by choosing one of the following • **EntryPoint** (least details) • **Tier** • **Critical** • **Major** • **Minor** (most details) To disable, select **Off**. This is the default setting.
Output Aggregated logs at level (lower increases impact)	If enabled, PerfCapture will include aggregated log information in the PowerSchool log files, which places further load (minimal impact on log file size) on the system. To enable, indicate the level detail you want included in the aggregated logs by choosing one of the following: • **EntryPoint** (least details) • **Tier** • **Critical** • **Major** • **Minor** (most details) To disable, select **Off**. This is the default setting.
Output Aggregated logging every (minutes)	If **Output Aggregated logs at level** is enabled, enter the frequency (lower impact on log file size) you want a PerfCapture message added to the aggregated logs.
Thread dumps enabled?	Select the checkbox to enable the thread dumps performance-profiling tool. If enabled, periodic thread dumps will be written to the folder <installation-base>/temp/powerschool/threaddumps. These thread dumps provide valuable data for PowerSchool software engineers. Thread dumps will place additional load on the system and consume disk space.

	Note: Enabling this option will take immediate effect on this server. On other servers in the array, there may be some delay based on server activity.
Disable PerfCapture logging and Thread Dumps at startup?	If PerfCapture and/or Thread Dumps is enabled, select the checkbox to automatically suspend PerfCapture logging and thread dumps when restarting PowerSchool. If disabled, you can avoid unnecessary logging, which takes up space on the server.

5. Click **Submit**. The System Settings page appears.

Reset Server

Using the Confirm Reset page, you can restart tomcat services on this server.

How to Reset the Server

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Reset Server**. The Confirm Reset page appears.
4. Use the following table to enter information in the fields:

Field	Description
Restart the OLTP Tomcat Service (includes PowerSchool)	Select the checkbox if this service needs to be restarted immediately. Otherwise, leave the checkbox blank.
Restart the OLAP Tomcat Service (includes ReportWorks)	Select the checkbox if this service needs to be restarted immediately. Otherwise, leave the checkbox blank.

5. Click **Restart selected services now**. The System Settings page appears.

Note: Based on the selected option, the system will go down momentarily until the service has been restarted.

Average Final Grades

In most cases, final grades are determined by the classroom teacher based on rules defined in PowerTeacher Gradebook. This leaves the control over students' grade reporting, and the calculation methodology of those grades, in the hands of the most authoritative source. However there are times when schedules are set up in a way where administrators want to average grades themselves instead of the teachers or they want to average grades across sections. The final grade averaging function provides school administrators an alternative means of calculating final grades.

The Process

The final grade averaging function can be run periodically by the PowerSchool administrator after storing grades. Final grades are calculated using up to six existing stored grades from each unique course taken during the current school year. Unique courses are identified by course number, not course name or section. Consequently, only grades that have been stored via the store grades process or hand-entered with a course number may be used in the calculation.

Once the stored grades for each course have been identified, the GPA points from each grade are averaged and the resulting value is used to create a new stored grade record. The averaging method can either be a simple arithmetic average, which is used by default, or may be weighted using a user-specified method. Each store code may receive a different weight. The weighting scheme used (20/30/50, 1/1/2, 0.2/0.2/0.6) is configurable.

The GPA point value is compared against the grade scale for the course. If an exact match is found, the letter grade corresponding to that value is used. For example, if the three grades A (4.0), B (3.0), and C (2.0) are used, with each having a weight of 1, the result would be 3. This 3 is looked up in the course's grade scale. An exact match of 3.000 is found, and a new stored grade is created using the letter grade B. However, if the C had a weight of 2, the result would be 2.75. In this case, there might not be an exact match, so the result would be rounded to the nearest value. In this case, 2.75 would be closer to 2.667 for a letter grade of B-. You can change the rounding behavior to always round up, always round down, or find the nearest value.

Since multiple letter grades may have identical GPA point values (for example, F, I, NC, and WF all have zero GPA points), the user can exclude certain letter grades from being used. This prevents a zero average from matching to NC on the grade scale. This is necessary because only the GPA point values, not the letter grades themselves, are looked at. The list of excluded letter grades must be recorded for each unique grade scale used.

Once the appropriate letter grade has been identified, absences, tardies, potential credit, earned credit (if the letter grade earns graduation credit), and teacher comments are calculated based on user-defined options. The resulting new grades are stored alongside the student's existing grades and can be printed on report cards and transcripts.

How to Modify Average Final Grades Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Grades, click **Average Final Grades**. The Average Final Grades page appears.
3. Use the following table to enter information in the fields:

Field	Description
Which Students	The students for whom you want to calculate average final grades. Do one of the following: • Select the single student option. This option is useful for testing. • Select **The selected students** option. This is useful when calculating final grades for a specific group of students, such as all current seniors. • Select the **All currently enrolled students** option. **Note:** If no students have been selected, only the **All currently enrolled students** option is available.
New store code	Indicates the new store code to use when storing the resulting final grade. Enter a valid store code (a letter followed by a single number). **Note:** The store code does not need to be defined in the Final Grade Setup section of School Setup.
Limit to this term	To filter by a term in the current school year, choose the term from the pop-up menu. To select all terms, do not select a term from the pop-up menu. If a specific term is selected, only stored grades from sections associated to the term will be averaged. This setting provides the ability to create administrative-level final grade weighting for a section that met during a specific term.

Use these final grades	Enter the store codes for up to six existing stored grades. You may optionally enter a weight value for each grade in the Weight field. This value is used in the calculation of the final letter grade but will not affect attendance or credit calculations. If no value is entered, 1 is used.
Absences and tardies are	The method by which you want absences and tardies calculated. Choose one of the following from the pop-up menu: • **Totals of values from historical grades** to record the cumulative total of absences and tardies from all final grades used. • **Averages of values from historical grades** to record the simple average of the absences and tardies from all final grades used. • **The value of the last record processed** to copy the absence and tardy numbers from the last final grade in the list. • **Do not calculate attendance** to record zeros for absences and tardies.
Potential credit is	The method by which you want potential credit hours determined. Choose one of the following from the pop-up menu: • **Total of potential credit from historical grades** to record the cumulative total of potential credit from all final grades used. • **Average of potential credit from historical grades** to record the simple average of the potential credit from all final grades used. • **The value of the last record processed** to copy the potential credit amount from the last final grade in the list. • **Potential credit from course record** to record the potential credit amount of the parent course record. • **Do not award credit** to record zero for potential credit.
Teacher comments are	The method by which you want teacher comments to be included. Choose one of the following from the pop-up menu:

	• **Taken from all historical grades** to copy the teacher comments from all final grades used. Comments are prefixed with the store code. • **Taken from the last record processed** to copy the teacher comment from the last final grade in the list. • **Do not include comments** to not include teacher comments.
For these grade scales, do not assign these grades	For each grade scale, enter a comma-separated list of letter grades that you want to exclude from the calculation, such as **WF** (withdraw fail) or **I** (incomplete). To include all grades from the grade scale in the calculation, leave the field blank.
Calculate average using	Use this pop-up menu to indicate whether or not to calculate the average using points or percentages by selecting one of the following: • **Grade Points** • **Percentages**
Store which Section ID	Use this pop-up menu to indicate whether or not to populate SectionID in the new stored grade record, thus allowing inclusion of the grade on report cards. Select one of the following: • **Do not store Section ID** • **First Enrolled Section** • **Last Enrolled Section**
Use Alternate Grade Points in Calculation	Select the checkbox to use alternate grade points in the calculation. If selected, the Alternative Grade points field that appears on the New Grade/Edit Grade pages will be used in the calculation.
Store Alternate Grade Points in	Select the checkbox to store alternate grade points in the new stored grade record. If deselected, the regular grade points for the resulting grade will be stored.

Stored Grades Record	
Overwrite Existing Stored Grades Records	Select the checkbox to allow the calculated average for a particular store code to overwrite existing data for the same store code. If deselected, the existing data will not be overwritten. In addition, extra records for the store code are not created.

4. Click **Submit**. PowerSchool calculates the average final grades for the requested group of students. Progress is indicated in the browser window.

   The system creates new historical grades for the selected students and stores them using the specified store code.

Email Setup

Use this page to set up email for various PowerSchool functions. The system sends email messages to PowerSchool users at your school, including teachers and administrators, as well as parents and guardians. PowerSchool can be configured to send automatic emails to students, guardians, teachers, and other staff members. However, before automatic emails are sent out, PowerSchool must be configured to relay these email messages through an email server.

Note: You cannot use PowerSchool to send email messages to other users, parents, or students. The following procedures refer to system-generated email messages only. Use an external email system to provide email services for staff, students, and administrators.

How to Set Up Email

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Email**. The Email Setup page appears. By default the Email Setup tab appears selected.
4. Use the following table to enter information in the fields:

Field	**Description**

Enable Email Notifications	In order for PowerSchool users to receive scheduled email notifications, choose **Yes** from the pop-up menu. Alternatively, if you do not want PowerSchool users to receive scheduled email notifications, choose **No** from the pop-up menu. **Note:** This setting only applies to scheduled email notifications and not to the **Send Now** feature available on the PowerSchool Student and Parent portal. Parents can receive information immediately whenever needed.
Enable Emailing Of Guardian Reports	In order for PowerSchool users to receive nightly automatically generated reports, choose **Yes** from the pop-up menu. Alternatively, if you do not want PowerSchool users to receive nightly automatically generated reports, choose **No** from the pop-up menu. **Note:** This setting is disabled if **Enable Email Notifications** is set to No.
POP/SMTP Server	Enter your PowerSchool mail server address. Although you can enter a domain name, an IP address is preferred.
E-mail Address Of PowerSchool Technical Administrator	Enter your system administrator's email address.
E-mail "From" Host For Mail Generated By PowerSchool	Enter the domain name that appears after all email addresses at your school. For example, if your email address is user@auhsd.ca.us, enter **auhsd.ca.us**. Do not enter an IP address in this field.
Use Advanced Email Settings	To use the new email architecture for PowerSchool emails, click the switch to **On**. By default, this feature is not enabled. The transport configuration parameters enabled by the new email architecture are typically required to use any Internet-based email service.

<table>
<tr>
<td>Email Transport Configuration Parameters</td>
<td>When the Use Advanced Email Settings switch is enabled, you can configure the following parameters:

Use SMTP Authentication: Click the switch to On to enable SMTP authentication, which allows PowerSchool to authenticate to a SMTP server. When selected, the following fields appear:

Username: Enter the SMTP username for your district email server. Typically, this is the email address you use on the server, but some servers may use other types of username.
Password: Enter the SMTP password for your district email server.

SSL Mode: Choose the connection method defined by the email server you are connecting to.
Allow unsecure SSL ciphers: Click the switch to On to enable SSL ciphers. When you enable this option, a checkbox appears. Select the checkbox to allow PowerSchool to use a large set of encryption options (ciphers) to communicate with the SFTP server. Deselect the checkbox to allow PowerSchool to use the most secure encryption options (ciphers) to communicate with the SFTP server. This is the more secure option.
Port Number: Enter the port number used by your district email server. If you do not enter a port number, the system defaults to 25.

Note: For specific information about configuring your district email server, refer to your district email server documentation.</td>
</tr>
<tr>
<td>Reply-To E-mail For Electronic Progress Reports Sent To Parents</td>
<td>Enter the email address to which parents can automatically reply when they receive a progress report email. On your mail server, you must set up an account that matches this address. Ensure that the email address you enter exists on your district's email server. For more information, see PowerSchool Student and Parent Portal Administration.</td>
</tr>
</table>

Reply-to Email For Parent Account Management	Enter the email address to which parents can automatically reply when they receive an account created, an account updated, or a password recovery email notification. On your mail server, you must set up an account that matches this address. Ensure that the email address you enter exists on your district's email server. For more information, see *PowerSchool Student and Parent Portal Administration*.
Complete E-mail Address To Use As The "From" Address When Sending System-Generated E-mail To Administrators And Teachers	Enter the email address you want administrators and teachers to reply to when they receive system-generated email messages. The system also displays this address as the From address in an email message. For example, if a student changes classes in the middle of a semester, the system sends an email message to the teacher of the class in which the student is enrolling. Ensure that the email address you enter exists on your district's email server.
Provide SMTP Settings to Oracle Application Express	To provide SMTP settings to Oracle Application Express, choose **Yes** from the pop-up menu. **Note:** Alternatively, to withhold SMTP settings to Oracle Application Express, choose **No** from the pop-up menu.

5. Set up the following account on your mail server: powerschool@<yourmailserver>. For example, if your email address is user@fhs.fuhsd.ca.us, then the account must be set up as **powerschool@fhs.fuhsd.ca.us**.
6. Click **Submit**. A confirmation message appears.

How to View the Outgoing Mail Queue

Use this page to view any email messages sent to users from your PowerSchool server. The Outgoing Mail Queue page has two different formats, depending on whether PowerSchool is configured to use advanced email settings.

If the **Use Advanced Email Settings** switch on the Email Setup tab is **Off**, the outgoing email queue only shows the recipient's email address and only shows messages that are waiting to be sent. Normally, PowerSchool immediately sends email messages and, with advanced email settings disabled, the messages only show up on the outgoing mail queue page while waiting to be sent. However, communication failures cause messages to temporarily reside in the outgoing mail queue.

If the **Use Advanced Email Settings** switch on the Email Setup tab is **On**, the Outgoing Mail Queue has more capabilities. All messages sent by PowerSchool are listed, including messages already sent successfully. For each email message, the page displays the more information for each message, including the recipient's address and the subject. You can only view this information.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Email**. The Email Setup page appears. By default the Email Setup tab appears selected.
4. Click the **Outgoing Mail Queue** tab. The Outgoing Mail Queue page displays.
5. If the **Use Advanced Email Settings** switch is **Off**, the page only displays unsent email messages.
6. If the **Use Advanced Email Settings** switch is **On**, the page displays unsent email messages, a Filter Results By function, additional email information, and navigation links:

Field	Description
Filter Results By	Use the filter function to narrow the list of emails by one or more of the following: • **Component** - Choose **All**, **PowerSchool**, or **PowerTeacher**. • **Status** - Choose **All**, **Completed**, **Failed**, or **Pending**. • **Date** - Enter the date for which you want to view emails or click the **Calendar** icon to select a date. Emails from that date and prior will appear. Click the arrow to collapse this section. Click the arrow again to expand this section.
Results	For each email listed, the following information appears: • Date • Component • Status • Recipients

	• Subject
[Navigation Links]	Click the arrows to scroll through the list of emails or enter a page number in the field provided to navigate to a specific page of the list. Use the pop-up menu to change the number of lines that display in the list.

How to Test Email

Use this page to send test email messages in PowerSchool.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Email**. The Email Setup page appears. By default the Email Setup tab appears selected.
4. Click the **Test Email** tab. The Test Email page appears.
5. Use the following table to enter information in the fields:

Field	Description
From	Enter the email address of the sender of the test email message.
To	Enter the email address of the receiver of the test email message.
Subject	Enter a description of the test email message.
Message	Enter the text of the test email message.

6. Click **Submit**. The system sends an email message to the recipient's address and displays an alert.

Global Server Settings

Use the Global Server Settings page to configure any application or external system that requires a connection to PowerSchool.

How to Configure PowerSchool Configuration - External Access

Note: These settings are initially configured during the PowerSchool installation process. For more information, see the *PowerSchool Installation Guide* available on PowerSource.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Use the following table to enter information in the PowerSchool Configuration - External Access fields:

Field	Description
Secure Server SSL	Select the checkbox if you are enabling SSL. **Note:** When utilizing the internal IP address behind the load balancer, SSL is typically not enabled. If so, do not select this checkbox. **Note:** This requires additional Tomcat configuration.
Server Host Name or IP Address	Verify that the information is the same as the PowerSchool server hostname or IP address on the internal network. **Note:** It is recommended that you do not use 127.0.0.1. If used, Tomcat must be running on every node PowerSchool is running on. If it is not, user will receive an error message when attempting to sign in to the PowerSchool Student and Parent portal on that node.
Port	Do one of the following: • If you are enabling SSL, enter **443**. This is the default SSL port. • If you are not enabling SSL, enter **80**. This is the default non-SSL port. N**ote:** When utilizing the internal IP address behind the load balancer, SSL is typically not enabled. If so, enter a non-SSL port. **Note:** You can also configure a different port if you wish to do so.

Allow connections only via host name	If selected and if connections are only allowed via the host name, any connections using any server address other than the Web server host name will be redirected to use the Web server host name. **Note:** It is recommended that the checkbox is deselected.

5. Click **Submit**.

   Note: It is recommended that you begin running without SSL to ensure that the application is configured properly before configuring the system to use SSL.

How to Configure PowerSchool Configuration - Internal Access

Note: These settings are initially configured during the PowerSchool installation process. For more information, see the *PowerSchool Installation Guide* available on PowerSource.

Note: To determine if you need a different server hostname or IP address for Tomcat Configuration Internal Access, open a browser on the server and launch PowerTeacher Gradebook. If the gradebook launches, the Tomcat Configuration - External Access values can be used to set up the Tomcat Configuration - Internal Access. If the gradebook does not launch, you need to use different values to set up Tomcat Configuration - Internal Access.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the PowerSchool Configuration - Internal Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.
6. Click **Submit**.

   Note: It is recommended that you begin running without SSL to ensure that the application is configured properly before configuring the system to use SSL.

How to Configure PowerTeacher Gradebook Settings - External Access

Note: These settings are initially configured during the PowerTeacher Gradebook installation process. For more information, see the *PowerTeacher Installation and Setup Guide* available on PowerSource.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the PowerTeacher Gradebook Settings - External Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.
6. Enter a value in the **PowerTeacher Gradebook Socket Timeout (Minutes)** field to indicate how many minutes PowerTeacher Gradebook will wait for a response from the server when processing any long-running transaction. If left blank, the timeout will use the default value of 3 minutes. You can set this value from 1-10 minutes.
7. Click **Submit**.

   Note: It is recommended that you begin running without SSL to ensure that the application is configured properly before configuring the system to use SSL.

How to Configure ReportWorks Developer Settings - External Access

Note: These settings are initially configured during the PowerSchool installation process. For more information, see the *PowerSchool Installation Guide* available on PowerSource.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the ReportWorks Developer Settings - External Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.

   Important: Make sure you set this to the same port that was specified during the PowerSchool installation process. The default port is **7980**.

6. Click **Submit**.

   Note: It is recommended that you begin running without SSL to ensure that the application is configured properly before configuring the system to use SSL.

How to View Application Message Service - Internal Access

Note: These settings are initially configured during the PowerSchool installation process. For more information, see the *Installation Guide for PowerSchool* available on PowerSource. Only one messaging server is set up for all environments.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the Application Message Service - Internal Access section. The following information appears:
    - **Server Host Name or IP Address**
    - **Port** - The default is set to **61616**.

    Note: For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.

How to Configure Document Attachments Settings - External Access

Note: These fields are populated with the **Server Host name or IP Address** and **Port** information entered for PowerSchool Configuration - External Access.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the Document Attachments Settings - External Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.
6. Click **Submit**.

How to Configure Document Attachments Settings - Internal Access

Note: These fields are populated with the **Server Host name or IP Address** and **Port** information entered for PowerSchool Configuration - Internal Access.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Global Server Settings**. The Global Server Settings page appears.
4. Scroll down to the Document Attachments Settings - Internal Access section.
5. Enter information as needed. For field descriptions, see *How to Configure PowerSchool Configuration - External Access*.
6. Click **Submit**.

MIME Types

PowerSchool uses Multipurpose Internet Mail Extension (MIME) types to enable a Web browser to display image and text files that are not in HTML format. The MIME type has a type and subtype separated by a slash, such as **image/gif** and **text/plain**. Your PowerSchool server sends the MIME type to the Web browser so that it can start the appropriate helper application or plug-in.

PowerSchool is preconfigured with a number of MIME types. Use this page to add, edit, and delete MIME types in PowerSchool.

How to Add MIME Types

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Mime Types**. The Mime Types page appears.
4. Click **New**. The Edit Mime Type page appears.
5. Use the following table to enter information in the fields:

Field	Description
Suffix	Enter the file type (extension).
MIME	Enter the MIME type and subtype, separated with a slash (**/**).

6. Click **Submit**. The Mime Types page displays the new MIME type.

How to Edit MIME Types

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Mime Types**. The Mime Types page appears.
4. Click the MIME type in the Mime column that you want to edit. The Edit Mime Type page appears.
5. Edit the information as needed. For field descriptions, see *How to Add MIME Types*.
6. Click **Submit**. The Mime Types page displays the edited MIME Type.

How to Delete MIME Types

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Mime Types**. The Mime Types page appears.
4. Click the MIME type in the Mime column that you want to delete. The Edit Mime Type page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Delete page appears.

Reporting Engine Settings

Use this page to automatically update your PowerSchool server with the latest state reports.

How to Modify Reporting Engine Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Reporting Engine**. The Reporting Engine page appears.
4. Select the **Automatic Update of State Reports Enabled** checkbox if you want PowerSchool to automatically update with any changes to state reports. Otherwise, deselect the checkbox.
5. Select the **Automatic Update of Global Reports Enabled** checkbox if you want PowerSchool to automatically update with any changes to global reports. Otherwise, deselect the checkbox.
6. Click **Submit**. The Changes Recorded page appears.

Select Student Options

Select up to three fields of information you want to appear next to each student's name on the Student Selection page. For more information about searching for and selecting students, see *Student Search*.

How to Modify Select Student Options

You can opt to select either three fields, two fields, one field, or no fields to appear next to students' names on the Student Selection page. To select less than three fields, choose the [blank] option from the remaining pop-up menus.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Select Student Options**. The Select Student Options page appears.
4. Use the following table to enter information in the fields:

Field	Description
Include Option 1	Choose an option from the pop-up menu: • [Blank] • **Student Number** • **Social Security Number (SSN)** • **Date of Birth** • **Grade Level**
Include Option 2	Choose an option from the pop-up menu: • [Blank] • **Student Number** • **Social Security Number (SSN)** • **Date of Birth** • **Grade Level**
Include Option 3	Choose an option from the pop-up menu: • [Blank] • **Student Number** • **Social Security Number (SSN)** • **Date of Birth** • **Grade Level**

5. Click **Submit**. The Select Student Options page displays the modifications.

Server Array Settings

PowerSchool server array is designed around a distributed network of PowerSchool servers. This type of server configuration improves data access and processing by spreading the load across multiple servers. Typically the Oracle database is installed on a dedicated server and PowerSchool is installed on two or more dedicated servers for handling web requests, PowerTeacher access, and processing reports

The Server List page displays the status of server roles. These roles may include:

- Task Master
- ReportWorks Queue
- Web Server
- DCF Scavenger

Note: For comprehensive information about server array settings, see the *PowerSchool Installation Guide* available on PowerSource.

How to Set Automatic Page Refresh on the Server List

You can choose how often the Server List page refreshes.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Array Settings**. The Server Array Settings page appears.
4. Click **Server List**. The Server List page appears.
5. On the **Refresh** button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes.
6. Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection.
7. To cancel the automatic page refresh, click the arrow and select the **Cancel** button.

How to Configure Server Array Preferences

Note: These settings are initially configured during the PowerSchool installation process.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Array Settings**. The Server Array Settings page appears.
4. Click **Server Array Preferences**. The Server Array Preferences page appears.
5. Edit the following information as needed:

- **UDP Messaging Port**

  Note: For field descriptions, see the *PowerSchool Installation Guide* available on PowerSource.

6. Click **Submit**. The server configuration resets.

How to Configure General Server Settings

The General Server Settings section displays basic information about the server.

Note: These settings are initially configured during the PowerSchool installation process.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Array Settings**. The Server Array Settings page appears.
4. Click **Server List**. The Server List page appears.
5. Click the **ID** or **Supplied Name** of the server you want to edit. The Edit Server page appears.
6. Edit the following information in the General Server Settings section as needed:
   - **User Supplied Name**
   - **Description**

   Note: For field descriptions, see the *PowerSchool Installation Guide* available on PowerSource.

7. Click **Submit**. The server configuration resets.

How to Configure Server Role Settings

Note: These settings are initially configured during the PowerSchool installation process.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Array Settings**. The Server Array Settings page appears.
4. Click **Server List**. The Server List page appears.
5. Click the **ID** or **Supplied Name** of the server you want to edit. The Edit Server page appears.
6. Edit the following information in the Server Role Settings section as needed:
   - **Run the Task Master on this server**

- **Run a Report Queue on this server**
- **My Report Queue**
- **Run Web Server**

Note: For field descriptions, see the *PowerSchool Installation Guide* available on PowerSource.

Note: The **Run the Application Message Service on this server** checkbox is read-only and appears selected if a message service was enabled and configured on this server during the PowerSchool installation process. For more information, see the *PowerSchool Installation Guide* available on PowerSource.

7. Click **Submit**. The server configuration resets.

How to Configure Web Server Image URL Handling

One way to improve the performance of PowerSchool is to designate a separate image server to store and handle the images associated with PowerSchool Web pages. This section of the Edit server page allows you to specify the name of an image server.

Note: These settings are initially configured during the PowerSchool installation process.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Click **System Settings**. The System Settings page appears.
3. Click **Server Array Settings**. The Server Array Settings page appears.
4. Click **Server List**. The Server List page appears.
5. Click the **ID** or **Supplied Name** of the server you want to edit. The Edit Server page appears.
6. Edit the following information in the Web Server Image URL Handling section as needed:
    - **Use Image Server**
    - **Image Server Address**
    - **Use Mixed Content for SSL**

    Note: For field descriptions, see the *PowerSchool Installation Guide* available on PowerSource.

7. Click **Submit**. The server configuration resets.

How to Configure Web Server Hit Log

The Web Server Hit Log causes PowerSchool to generate an NCSA Combined formatted log file. This file can be analyzed with a third-party log analysis tools.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Array Settings**. The Server Array Settings page appears.
4. Click **Server List**. The Server List page appears.
5. Click the **ID** or **Supplied Name** of the server you want to edit. The Edit Server page appears.
6. Enter the following information in the Web Server Hit Log section as needed:

Field	Description
Hit Log Enabled	Select the checkbox to enable HTTP and TCP Error Logging. By default, the checkbox is not selected.
Log DNS Name Instead of IP Address	Select the checkbox to override logging the IP Address with the DNS name when errors occur. By default, the checkbox is not selected. **Note:** Enabling this function may impact performance.

7. Click **Submit**. The server configuration resets.

Server Licensing

The PowerSchool server includes software licensing in the form of a server licensing key. During deployment, PowerSchool provides each customer with a server licensing key tied to the server's district customer number. The licensing key enforces a number of items, including the platform, maximum number of schools and students, and expiration dates.

How to Enter the Server License Key

There are two ways to enter a server licensing key: from the server and from the Server Licensing page in PowerSchool. Enter the licensing key from the server during your initial implementation or when a licensing key becomes invalid. Use the Server Licensing page in PowerSchool to enter the initial licensing key for upgrading customers or whenever a new licensing key is required.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Licensing**. The Server Licensing page appears.
4. Enter the license key provided by PowerSchool in the **License Key** field.
5. Click **Submit**. The server license key is saved.

If the licensing key is valid, the Licensing Settings section displays the licensing information. If the licensing key is for a beta version, expires, or is tied to a specific version of PowerSchool Server, that information appears at the bottom in red.

If the licensing key is invalid, does not match, or exceeds the licensing settings, that information also appears in red.

The next time PowerSchool Server is started, a dialog appears on the server computer and requests a valid licensing number. PowerSchool Server will not function without a valid licensing key.

Server Settings

Server settings relate specifically to the dedicated server that runs the PowerSchool application.

Note: For comprehensive information about server array settings, see the *PowerSchool Installation Guide* available on PowerSource.

How to Configure Web Server Image URL Handling Settings

One way to improve the performance of PowerSchool is to designate a separate image server to store and handle the images associated with PowerSchool Web pages. This section of the Edit server page allows you to specify the name of an image server.

Note: These settings are initially configured during the PowerSchool installation process.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Settings**. The Edit Server page appears.
4. Edit the following information in the Web Server section as needed:
    - **Use Image Server**
    - **Image Server Address**

    Note: For field descriptions, see the *PowerSchool Installation Guide* available on PowerSource.

5. Click **Submit**. The server configuration resets.

How to Configure Web Server Hit Log

The Web Server Hit Log causes PowerSchool to generate an NCSA Combined formatted log file. This file can be analyzed with a third-party log analysis tools.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Settings**. The Edit Server page appears.
4. Enter the following information in the Web Server section as needed:

Field	Description
Hit Log Enabled	Select the checkbox to enable HTTP and TCP Error Logging. By default, the checkbox is not selected.
Log DNS Name Instead of IP Address	Select the checkbox to override logging the IP Address with the DNS name when errors occur. By default, the checkbox is not selected. **Note:** Enabling this function may slow performance.

5. Click **Submit**. The server configuration resets.

Server Statistics

Use this page to view information related to your PowerSchool server. The page is divided into the following sections:

- **Server Information:** Displays your server's basic information.
- **Schools:** Displays information about each school on this server.
- **Memory:** Displays the amount of memory on your server by memory type.
- **PowerSchool Volume:** Displays the size and location of the PowerSchool system on your server.
- **Users:** Displays the number of users currently signed in to the system and any disabled user IP addresses.
- **Handlers:** Displays handler information.

- **Hits:** Displays the number of page item requests by user type, including web pages and images.
- **Processes:** Displays the status of all the services on the server.
- **Data:** Displays the number of active schools, students, staff members, and courses.
- **Tables:** Displays each PowerSchool table name and the number of records in each.

For more information about handlers, listens, hits, and ports, see *Server Settings Information*.

How to View Server Statistics

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Statistics**. The Server Statistics page appears.
4. Use the following table to understand the information in the Server Info section:

Field	Description
District Name	Name of the district used in your system.
Customer Support Number	Number used to identify your PowerSchool system to PowerSchool Technical Support.
PowerSchool Version	Current version and build number of the PowerSchool system.
Date and Time	Current system date and time.
Updating From This Server	Indicates if updating PowerSchool is possible from this server.
Machine Name	Network name of server.
Platform	Hardware system used to run PowerSchool.

Operating System	Name of the operating system used on the server. An operating system is a program that controls the hardware and application programs on a computer.
Server Location	Internet or network location of the server, expressed as either an IP address or URL.
Primary IP Address	IP address of your PowerSchool system on the server.
Machine Uptime	Amount of time the server has run since the last time it was restarted.
PowerSchool Uptime	Amount of time the PowerSchool system has run since the last time it was restarted.

5. Use the following table to understand the information in the Schools section:

Field	**Description**
School Name	Name of the schools on the system.
School Number	School number assigned to each school.
Grade Range	Range of grade levels for each school.
Number of Active Students	Number of enrolled students at each school.

6. Use the following table to understand the information in the Memory section.

Field	**Description**
Pre-allocated memory	Number of bytes of random access memory (RAM) installed on the server.

Maximum memory	Number of bytes of hard drive space used to supplement the server's memory capacity.
Free pre-allocated memory	Number of bytes of memory that are available to run PowerSchool.

7. Use the following table to understand the information in the PowerSchool Volume section:

Field	**Description**
Installed Path	Path of the PowerSchool root directory.
Volume Size	Number of bytes of storage on the server.
Used Space	Number of used bytes of storage on the server.
Free Space	Number of available bytes of storage on the server.
Document Attachment Quota	Number of bytes used and total number of bytes of storage on the server for document attachments.

8. Use the following table to understand the information in the Users section:

Field	**Description**
Currently Connected Users	Number of users currently signed in to PowerSchool. Click the number to access the Current Users page, which displays information about users that are currently logged in to PowerSchool. For more information, see *Current Users*.
Highest Number of Users Today	Highest number of users signed in to PowerSchool at any time today.

Disabled IP Addresses	Number of IP addresses disabled due to multiple failed sign in attempts. Click the number to access the Disabled IP Addresses page, which displays information about the IP addresses that have been disabled because they exceeded the maximum number of invalid sign in attempts. For more information, see *Sign In Attempts Restrictions*.

9. Use the following table to understand the information in the Handlers section:

Field	**Description**
Busy Handlers	Number of threads (processes) the web server is currently running, such as 5. Click the number to access the Process Status page, which displays information about what processes are running or potentially blocked from running. On the Process Status page, click the **ID** number to view detailed information about a thread (process). The Process Detail page displays a "thread-dump," which can be used for diagnostic purposes. **Note:** If a thread (process) becomes idle for too long, it is terminated by the web server.
Current Handlers	Number of threads (processes) sitting in a waiting state, such as 15. If more users connect to the web server, these threads (processes) turn into Busy Handlers. **Note:** The number of threads (processes) fluctuates as the web server detects more or less activity.
Maximum Handlers	Maximum number of threads (processes) the web server is configured to run, such as 20. If there are not enough threads (processes) to handle the current work load, the web server creates more threads (processes), up to the maximum number that has been configured. For more information, see *Server Settings*.

10. Use the following table to understand the information in the Hits section:

Field	Description
Total Hits	Number of hits or file requests made to PowerSchool since installed.
Hits today	Number of hits made to PowerSchool so far today.
Admin Hits Today	Number of hits made to the PowerSchool Administration pages so far today.
Teacher/Sub Hits Today	Number of hits made to the PowerTeacher or the Substitute Teacher pages so far today.
Parent Hits Today	Number of hits made to the PowerSchool Parent Access pages under a parent username so far today.
Student Hits Today	Number of hits made to the PowerSchool Parent Access pages under a student username so far today.
Portal Hits Today	Number of hits made to the PowerSchool Parent Access pages so far today.

11. Use the following table to understand the information in the Processes section:

Field	Description
Task Server	Indicates if the Task Server is running or not.
Log Process	Indicates if the Log Process is running or not.
Report Queue	Indicates if the Report Queue is running or not.

12. Use the following table to understand the information in the Data section:

Field	Description
Schools on Server	Number of schools on the server.
Active Students on Server	Number of students enrolled at all schools on the server.
Active Staff on Server	Number of current staff members at all schools on the server.
Courses on Server	Number of courses at all schools on the server.

13. Use the following table to understand the information in the Tables section:

Field	Description
Table Name (number)	Name of the table.
Records	Number of records in the table. Click the number next to the table to access the Direct Database Export (DDE) page, which you can use to run the Direct Database Export for that table. For more information, see *Direct Database Export*.

14. Use the following table to understand the information in the Database Connections section:

Field	Description
Max	Maximum number of connections possible in the connection pool for the PowerSchool webapp for this node.
Current	Current number of connections marked as being used in the connection pool for the PowerSchool webapp for this node.

Idle	Idle number of connections currently assigned to the connection pool the PowerSchool webapp for this node.

Server Tools

Server tools include the ability to automatically ping the server to confirm the server's availability.

How to Use Server Tools

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Server Tools**. The Server Tools page appears.
4. Select the **Auto Ping Every 5 Mins.** checkbox to try reaching your server every five minutes. This checkbox is typically selected when you want to make sure your server is running and available and when troubleshooting.
5. Click **Submit**. The server tools are either active or inactive, depending on your selection.

System Security

Use this page to modify system-level security settings. The settings relate to several security settings in PowerSchool, including the amount of time that can pass before a PowerSchool or the PowerSchool Student and Parent portal user is automatically signed out of the system due to inactivity; the default security level for a page when no page-specific security is set; and setting for remote support access. For more information, see *Security*.

Note: Any change will take effect on the next server restart.

How to Set System Security

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Server, click **System Settings**. The System Settings page appears.
3. Click **Security**. The Security Settings page appears.
4. Use the following table to enter information in the fields:

Field	Description
Maximum number of concurrent user sessions	Enter the maximum number of user sessions that can occur on PowerSchool simultaneously. **Note:** Approximately 40k of memory are used per 100 sessions.
Maximum number of concurrent student sessions	Enter the maximum number of student sessions that can occur on the PowerSchool Student and Parent portal simultaneously.
Maximum number of concurrent parent sessions	Enter the maximum number of parent sessions that can occur on the PowerSchool Student and Parent portal simultaneously. For more information, see *PowerSchool Student and Parent Portal Administration*.
Allow users to restore session that have been timed out due to inactivity	Click the switch to **On** to allow users to restore session that have been timed out due to inactivity. Alternatively, click the switch to **Off** to disable this feature. **Note:** By default, the switch is set to **Off**.
Sign Out Administrative Users After This Many Minutes Of Inactivity	Enter the number of minutes that can pass before a PowerSchool user is automatically signed out of the system due to inactivity. This setting applies to PowerSchool, PowerTeacher, and PowerTeacher Substitute. If a value is entered, users will see one of the following messages when their sessions are close to timing out: • Several minutes before timeout, the user will see "You are about to be signed out due to inactivity. Click **Stay Signed In** or anywhere on this page to continue." • When session timeout is detected, the user will see "You have been signed out. Return to **Sign In Page**."
Sign Out Parent Users After This	Enter the number of minutes that can pass before a PowerSchool Student and Parent portal user is automatically signed out of the

Many Minutes Of Inactivity	system due to inactivity. For more information, see *PowerSchool Student and Parent Portal Administration*. If a value is entered, users will see one of the following messages when their sessions are close to timing out: • Several minutes before timeout, the user will see "You are about to be signed out due to inactivity. Click **Stay Signed In** or anywhere on this page to continue." • When session timeout is detected, the user will see "You have been signed out. Return to **Sign In Page**."
Unless Specified Otherwise for an Individual Screen, Groups Have This Level Of Access	Enter a default level of access for all users for individual pages. For each user group, you can define their level of access on every PowerSchool page.
Enable MyData Download for Parents	The MyData button is a joint project between the Office of Educational Technology and the White House Office of Science and Technology Policy that, among other goals, allows access to student data in order to create a personal learning profile that is easily portable. PowerSchool provides parents with the ability to download their students' data, including grades and attendance, in an XML-formatted file. Click the switch to **On** to display the MyData button on the PowerSchool Student and Parent portal. Alternatively, click the switch to **Off** to disable this feature. **Note:** The MyData button requires that PowerSchool is running on SSL (Secure Sockets Layer), ensuring that the data transmission is secure.
Enable PowerSchool Session Cookies to span Subdomains	If the PowerSchool session cookie needs to be submitted by the browser to another server/identity provider running on a different subdomain than the PowerSchool server for integration with external systems, click the switch to **On** to enable PowerSchool session cookies to span subdomains.

	If enabled, the PowerSchool session cookie will be sent by the browsers to the subdomains of the specified domain. For example, if PowerSchool is running on powerschool.com and you specify powerschool.com as the domain, then the PowerSchool session cookie will be submitted to all the subdomains of powerschool.com, such as school.powerschool.com or district.powerschool.com. Alternatively, click the switch to **Off** to disable this feature.
PowerSchool Domain	If the **Enable PowerSchool Session Cookies to span Subdomains** checkbox is selected, enter the valid domain name on which PowerSchool is running, such as myschooldistrict.com. **Note:** The PowerSchool Session Cookies to Span Subdomains feature will not work without a valid domain name.
Disable Remote Support	Click to disable remote support with no time limit.
Enable Remote Support	Click to enable remote support with no time limit. **Remote Support Security:** PowerSchool strongly recommends that SSL be enabled on your PowerSchool server to ensure all data passed between your server and PowerSchool Technical Support remains secure and private. If SSL is not enabled, data moving between your server and PowerSchool is unencrypted. For more information, see the *SSL Configuration* section of the *Installation Guide* available on PowerSource.
Temporarily Enable Remote Support	Click to enter start and end dates for remote support access. The following fields appear. • **Starting Date** - Enter a start date or click the calendar icon to select a date. • **Ending Date** - Enter an end date or click the calendar icon to select a date. **Note**: Date format must be one of the following: • mm/dd/yyyy

	• mm/dd/yy • m/d/yyyy • m/d/yy • mm-dd-yyyy • mm-dd-yy • m-d-yyyy • m-d-yy

5. Click **Submit**. The System Settings page appears.

Database Extensions and Custom Field Migration

Database extensions allow you to display customized information in PowerSchool. Database extensions replace what was formerly known as custom fields. You can manage your database extensions in PowerSchool. In addition, you will be able to use existing functionality such as import, export, and reporting tools to access database extension data. Database extensions provide an expandable foundation for developing custom page content.

Database extensions provide the following benefits:

- Improves the reliability of custom data elements and provides a solution for existing pages and reports.
- Improves application performance when accessing database extension data elements directly.
- Removes the dependency on custom fields and virtual tables, enabling PowerSchool to run in a fully customized manner.

How it Works

Database extensions may be created through the PowerSchool user interface and define the table structure and related fields. There are three basic types of tables defined in a database extension:

- One-to-one table extension
- One-to-many table extension
- Independent table (not linked to a PowerSchool table)

You can use different combinations of these table types:

- Add a one-to-one table extension to a PowerSchool table, a one-to-many table extension, or an independent table. You can only have one table extension on any other table.
- Add a one-to-many table extension to a PowerSchool table, another one-to-many table extension, or an independent table.
- Independent tables do not extend from another table.

Once a table is extended, you can add fields to the table and specify data types as well as migrate remaining user-created legacy custom fields to the extension table. The new table and field extensions are available on the Custom Fields and Screens pages.

Create Table and Field Extensions

Create new and manage existing database extensions from the Page and Data Management page. Coordinate with your district to ensure that migration of custom fields are only processed by one person.

The overall steps for adding a database extension are as follows:

1. Select the functional area of the application to extend or create an independent table for the extended data.
2. Select a workflow type. You can add fields to the default extension, or create and manage database extensions, tables and fields.
3. Choose a PowerSchool database extension table to modify or create a new table.
4. Create new fields for the database extension table.

How to Add a Field to a Default Extension

Use the default database extension group and table to easily add a new field. A default extension is available for every table. To create an independent table, see *How to Create a New Independent Table*.

Note: Data migration from a legacy custom field is required at the time the Database Extension column is created. Once an extension column is created, legacy custom field data can no longer be migrated into the Database Extension column.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	Description
Choose the Database Table to Extend	Choose the PowerSchool table that you want to extend from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Basic Extension** option.

5. Click **Next**. The Create New Fields for Database Extension Table: [Table Name] section appears.
6. To add new fields for the database extension table, click **Add**. The Add Field pop-up appears.
7. Use the following table to enter information in the fields:

Field	Description
Name	Enter the field name as it will appear in PowerSchool.
Type	Select the filed data type from the pop-up menu: • **String**: Fixed-length character string. Strings in excess of 4000 characters will be truncated. • **Integer**: A number that can be written without a fractional or decimal component. • **Date**: A point-in-time value. • **Double**: An approximate representation of a decimal value. • **Boolean**: Data has two values (1=true and 0=false). • **CLOB**: (Character Large Object) data stored in a separate location referenced by the table.
Length	Enter the maximum length of data that can be entered in the field (up to 4000). **Note:** When editing this field, the value can be increased, but it cannot be decreased.
Default Value	Enter the default value for the field.
Migrate Data From	**Note:** This option must be performed at field creation if the legacy data is required in the newly created field. Choose a legacy custom field in order to migrate data from the selected field to your database extension field. The default **Type** is set to **String** and the default **Length** is set to **4000** automatically. This option is unavailable if there are no remaining legacy custom

	fields. (**Note:** The data is migrated after you create your field list and you click **Submit**.)
Description	Enter a brief description of the field.

8. Click **Apply** on the Add Field pop-up when you have finished entering field information.

   To modify the field you added:

   - Click **Edit** to change the field details.
   - Click **Delete** to remove the field from the list.
   - To return to the previous section, click **Previous**.
9. Click **Submit**. The database extension and fields you added are saved.

How to Choose or Add New Database Extension Group for a Selected Table

Add fields to an existing database extension group of your choosing. You can also add a new group.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	Description
Choose the Database Table to Extend	Choose the PowerSchool table that you want to extend from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Advanced Extension** option.

5. Click **Next**. The Choose or Add New Database Extension Group for [Table Name] section appears.
6. Select one of the following options:
   - **View only database extension groups for the current functional area** to filter the list to display only the extension groups for the functional area you selected.
   - **View all user created database extension groups** to filter the list to display all of the extension groups created by your PowerSchool users.
7. To add a new extension group, click **Add** and then enter the extension name in the pop-up. The name will be prefixed with U_ in the title. Click **Apply** when you have finished entering the group name. The extension group you added now appears in the Choose or Add New Database Extension Group for [Table Name] section.

   To modify the group you added:

   - Click **Edit** to change the Extension Name.
   - Click **Delete** to remove the group from the list.

     Note: The **Edit** button will remain available until you click **Submit**.

   - To return to previous sections, click **Previous**.
8. Select the database extension group you want to work with from the list provided.
9. Click **Next**. The Choose or Add New Database Extension Table for [Selected Group] section appears.
10. To add a new extension table, click **Add** and then enter the table name in the pop-up. The name will be prefixed with U_ in the title. Click **Apply** when you have finished entering the group name on the Add Extension pop-up. The table you added now appears in the Choose or Add New Database Extension Table for [Selected Group] section.

    Note that you can only add a single one-to-one extended table, but you can add multiple one-to-many extension tables. When adding a one-to-many extension table, select the **Can have multiple records** checkbox.

    To modify the table you added:

    - Click **Edit** to change the Extension Table Name.
    - Click **Delete** to remove the table from the list.

      Note: You cannot change the name of a one-to-one table. In order to change the name of a one-to-one table, delete the default table and then add a new one-to-one table with the name you choose.

Note: The **Edit** button will remain available until you click **Submit**.

- To return to previous sections, click **Previous**.

Note: Some database extensions are provided in PowerSchool. These preconfigured database extensions and fields are not accessible or modifiable by users. For a complete listing of these extensions, see the *PowerSchool Data Dictionary Tables* available on PowerSource.

11. Select the database extension table you want to add fields to from the list provided.
12. Click **Next**. The Create New Fields for Database Extension Table section appears.
13. To add new fields for the database extension table, click **Add**. The Add Field pop-up appears.
14. Use the following table to enter information in the fields provided:

Field	Description
Name	Enter the field name as it will appear in PowerSchool
Type	Select the filed data type from the pop-up menu: • **String**: Fixed-length character string. Strings in excess of 4000 characters will be truncated. • **Integer**: A number that can be written without a fractional or decimal component. • **Date**: A point-in-time value. • **Double**: An approximate representation of a decimal value. • **Boolean**: Data has two values (1=true and 0=false). • **CLOB**: (Character Large Object) data stored in a separate location referenced by the table.
Length	Enter the maximum length of data that can be entered in the field (up to 4000). **Note:** When editing this field, the value can be increased, but it cannot be decreased.
Default Value	Enter the default value for the field.

Migrate Data From	**Note:** This option must be performed at field creation if the legacy data is required in the newly created field. Choose a legacy custom field in order to migrate data from the selected field to your database extension field. The default **Type** is set to **String** and the default **Length** is set to **4000** automatically. This option is unavailable if there are no remaining legacy custom fields. (**Note:** The data is migrated after you create your field list and you click **Submit**.)
Description	Enter a brief description of the field.

15. Click **Apply** when you have finished entering field information on the Add Field pop-up.

    To modify the field you added:

    - Click **Edit** to change the field details.
    - Click **Delete** to remove the field from the list.
    - To return to previous sections, click **Previous**.
16. Click **Submit**. The database extension and fields you selected or added are saved.

    Note: You must restart ReportWorks Services in the PowerSchool Installer in order for these changes to take effect in ReportWorks. For more information, see *Reset Server*.

Create a New Independent Table

You can create an independent table extension not associated with an existing PowerSchool table.

How to Create a New Independent Table

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. In the Choose Functional Area section, select **Other** from the pop-up menu.

5. Click **Add Independent Table** to create a table that is independent of any existing tables or functional areas. The Choose or Add New Database Extension Group for IndependentTable section appears.
6. Select one of the following options:
   - **View only database extension groups for the current functional area** to filter the list to display only the extension groups for the functional area you selected.
   - **View all user created database extension groups** to filter the list to display all of the extension groups created by your PowerSchool users.
7. To add a new extension group, click **Add** and then enter the extension name in the pop-up. The name will be prefixed with U_ in the title. Click **Apply** when you have finished entering the group name. The extension group you added now appears in the Choose or Add New Database Extension Group for IndependentTable section.

   To modify the group you added:

   - Click **Edit** to change the Extension Name.
   - Click **Delete** to remove the group from the list.

     Note: The **Edit** button will remain available until you click **Submit**.

   - To return to previous sections, click **Previous**.
8. Select the database extension group you want to work with from the list provided.
9. Click **Next**. The Choose or Add New Database Extension Table for [Selected Group] section appears.
10. To add a new extension table, click **Add** and then enter the table name in the pop-up. The name will be prefixed with U_ in the title. Click **Apply** when you have finished entering the group name on the Add Extension pop-up. The table you added now appears in the Choose or Add New Database Extension Table for [Selected Group] section.

    Note that you can only add a single one-to-one extended table, but you can add multiple one-to-many extension tables. When adding a one-to-many extension table, select the **Can have multiple records** checkbox.

    To modify the table you added:

    - Click **Edit** to change the Extension Table Name.
    - Click **Delete** to remove the table from the list.

      Note: The **Edit** button will remain available until you click **Submit**.

- To return to previous sections, click **Previous**.

Note: Some database extensions are provided in PowerSchool. These preconfigured database extensions and fields are not accessible or modifiable by users. For a complete listing of these extensions, see the *PowerSchool Data Dictionary Tables* available on PowerSource.

11. Select the database extension table you want to add fields to from the list provided.
12. Click **Next**. The Create New Fields for Database Extension Table section appears.
13. To add new fields for the database extension table, click **Add**. The Add Field pop-up appears.
14. Use the following table to enter information in the fields provided:

Field	Description
Name	Enter the field name as it will appear in PowerSchool
Type	Select the filed data type from the pop-up menu: • **String**: Fixed-length character string. Strings in excess of 4000 characters will be truncated. • **Integer**: A number that can be written without a fractional or decimal component. • **Date**: A point-in-time value. • **Double**: An approximate representation of a decimal value. • **Boolean**: Data has two values (1=true and 0=false). • **CLOB**: (Character Large Object) data stored in a separate location referenced by the table.
Length	Enter the maximum length of data that can be entered in the field (up to 4000). **Note:** When editing this field, the value can be increased, but it cannot be decreased.
Default Value	Enter the default value for the field.

Migrate Data From	Choose a legacy custom field in order to migrate data from the selected field to your database extension field. The default Type is set to String and the default Length is set to 4000 automatically. This option is unavailable if there are no existing legacy custom fields.
Description	Enter a brief description of the field.

15. Click **Apply** when you have finished entering field information on the Add Field pop-up.

    To modify the field you added:

    - Click **Edit** to change the field details.
    - Click **Delete** to remove the field from the list.
    - To return to previous sections, click **Previous**.
16. Click **Submit**. The database extension and fields you selected or added are saved.

    Note: You must restart ReportWorks Services in the PowerSchool Installer in order for these changes to take effect in ReportWorks. For more information, see *Reset Server*.

Edit Fields and Tables

Once tables and fields have been created, you may find it necessary to edit one or more of those items.

How to Edit a Field

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	**Description**

Choose the Database Table to Extend	Choose the PowerSchool table that you want to work with from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Advanced Extension** option.

5. Click **Next**. The Choose or Add New Database Extension Group section appears.
6. Click **Next**. The Choose or Add New Database Extension Table section appears.
7. Select the **Extension Table Name** option that you want to work with.
8. Click **Next**. The Create New Fields for Database Extension Table section appears.
9. Click the **Edit** icon next to the field name you want to edit. The Edit Field pop-up appears.
10. Edit the field as needed.
11. Click **Apply**. The Edit Field pop-up closes.
12. Click **Submit**. A confirmation message appears.

How to Edit a Table

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	Description
Choose the Database Table to Extend	Choose the PowerSchool table that you want to work with from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Advanced Extension** option.

5. Click **Next**. The Choose or Add New Database Extension Group section appears.
6. Click **Next**. The Choose or Add New Database Extension Table section appears.
7. Select the **Extension Table Name** option that you want to edit.
8. Click the **Edit** icon next to the selected extension table name. The Edit Table pop-up appears.
9. Edit the table as needed.
10. Click **Apply**. The Edit Table pop-up closes.
11. Click **Submit**. A confirmation message appears.

Delete Fields, Tables, and Extensions

Once extensions, tables, and fields have been created, you may find it necessary to delete one or more of those items. When deleting an existing field in an extension table, note that the field may contain data. If you delete the field, that data will be permanently deleted. When deleting an existing table from an extension, note that table may contain data. If you delete the table, that data will be permanently deleted. When deleting an existing extension, note that the extension contains at least one table, which may contain data. If you delete the extension, that data will be permanently deleted.

How to Delete a Field

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	Description
Choose the Database Table to Extend	Choose the PowerSchool table that you want to work with from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Advanced Extension** option.

5. Click **Next**. The Choose or Add New Database Extension Group section appears.
6. Click **Next**. The Choose or Add New Database Extension Table section appears.
7. Select the **Extension Table Name** option that you want to work with.
8. Click **Next**. The Create New Fields for Database Extension Table section appears.
9. Click the **Delete** icon next to the field name you want to delete.
10. Note the **Status** changes from **Existing** to **Delete Pending**.

    Note: Click **Undo Delete** if you do not want to delete the field.

11. Click **Submit**. A warning message appears.
12. Click **Ok** to delete the field. A confirmation message appears.

How to Delete a Table

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	Description
Choose the Database Table to Extend	Choose the PowerSchool table that you want to work with from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Advanced Extension** option.

5. Click **Next**. The Choose or Add New Database Extension Group section appears.
6. Click **Next**. The Choose or Add New Database Extension Table section appears.
7. Select the **Extension Table Name** option that you want to delete.
8. Click the **Delete** icon next to the selected extension table name. A warning message appears.
9. Click **Ok** to delete the field. A confirmation message appears.

How to Delete an Extension

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
3. Under Database Management, click **Manage Database Extensions**. The Manage Database Extensions page appears.
4. Use the following table to enter information in the Choose Functional Area section:

Field	Description
Choose the Database Table to Extend	Choose the PowerSchool table that you want to work with from the pop-up menu. **Note:** To view a longer list of PowerSchool tables, choose **Other**, and then select a table from the additional pop-up that appears.
Choose Workflow Type	Select the **Advanced Extension** option.

5. Click **Next**. The Choose or Add New Database Extension Group section appears.
6. Select the **Extension Name** option that you want to delete.
7. Click the **Delete** icon next to the selected extension name. A warning message appears.
8. Click **Ok** to delete the field. A confirmation message appears.

Database Reserved Words

PowerSchool leverages Oracle, the leading relational database management solution for enterprise applications. Oracle is an SQL-based database. SQL is a standard language that many applications use to communicate with database management systems. The PowerSchool application is written in Java and translates web requests to standard SQL statements that are sent to Oracle for processing.

The following words are reserved by Oracle. That is, they have a special meaning to Oracle and cannot be redefined. For this reason, you cannot use them to name database extensions.

Oracle Reserved Words

Access	Else	Modify	Start
Add	Exclusive	Noaudit	Select
All	Exists	Nocompress	Session
Alter	File	Not	Set
And	Float	Notfound	Share
Any	For	Nowait	Size
Arraylen	From	Null	Smallint
As	Grant	Number	Sqlbuf
Asc	Group	Of	Successful
Audit	Having	Offline	Synonym
Between	Identified	On	Sysdate
By	Immediate	Online	Table
Char	In	Option	Then
Check	Increment	Or	To
Cluster	Index	Order	Trigger
Column	Initial	Pctfree	Uid
Comment	Insert	Prior	Union

Compress	Integer	Privileges	Unique
Connect	Intersect	Public	Update
Create	Into	Raw	User
Current	Is	Rename	Validate
Date	Level	Resource	Values
Decimal	Like	Revoke	Varchar
Default	Lock	Row	Varchar2
Delete	Long	Rowid	View
Desc	Maxextents	Rowlabel	Whenever
Distinct	Minus	Rownum	Where
Drop	Mode	Rows	With

Oracle Keywords

Admin	End	Min	Reuse
After	Escape	Minextents	Role
Allocate	Events	Minvalue	Roles
Analyze	Except	Module	Rollback
Archive	Exceptions	Mount	Savepoint

Archivelog	Exec	New	Schema
Authorization	Execute	Next	Scn
Avg	Explain	Noarchivelog	Section
Backup	Extent	Nocache	Segment
Become	Externally	Nocycle	Sequence
Before	Fetch	Nomaxvalue	Shared
Begin	Flush	Nominvalue	Snapshot
Block	Force	None	Some
Body	Foreign	Noorder	Sort
Cache	Fortran	Noresetlogs	Sql
Cancel	Found	Normal	Sqlcode
Cascade	Freelist	Nosort	Sqlerror
Change	Freelists	Numeric	Sqlstate
Character	Function	Off	Statement_Id
Checkpoint	Go	Old	Statistics
Close	Goto	Only	Stop
Cobol	Groups	Open	Storage

Commit	Including	Optimal	Sum
Compile	Indicator	Own	Switch
Constraint	Initrans	Package	System
Constraints	Instance	Parallel	Tables
Contents	Int	Pctincrease	Tablespace
Continue	Key	Pctused	Temporary
Controlfile	Language	Plan	Thread
Count	Layer	Pli	Time
Cursor	Link	Precision	Tracing
Cycle	Lists	Primary	Transaction
Database	Logfile	Private	Triggers
Datafile	Manage	Procedure	Truncate
Dba	Manual	Profile	Under
Dec	Max	Quota	Unlimited
Declare	Maxdatafiles	Read	Until
Disable	Maxinstances	Real	Use
Dismount	Maxlogfiles	Recover	Using

Double	Maxloghistory	References	When
Dump	Maxlogmembers	Referencing	Work
Each	Maxtrans	Resetlogs	Write
Enable	Maxvalue	Restricted	

PL/SQL Reserved Words

Abort	Between	Crash	Digits
Accept	Binary_Integer	Create	Dispose
Access	Body	Current	Distinct
Add	Boolean	Currval	Do
All	By	Cursor	Drop
Alter	Case	Database	Else
And	Char	Data_Base	Elsif
Any	Char_Base	Date	End
Array	Check	Dba	Entry
Arraylen	Close	Debugoff	Exception
As	Cluster	Debugon	Exception_Init
Asc	Clusters	Declare	Exists

Assert	Colauth	Decimal	Exit
Assign	Columns	Default	False
At	Commit	Definition	Fetch
Authorization	Compress	Delay	Float
Avg	Connect	Delete	For
Base_Table	Constant	Delta	Form
Begin	Count	Desc	From
Function	New	Release	Sum
Generic	Nextval	Remr	Tabauth
Goto	Nocompress	Rename	Table
Grant	Not	Resource	Tables
Group	Null	Return	Task
Having	Number	Reverse	Terminate
Identified	Number_Base	Revoke	Then
If	Of	Rollback	To
In	On	Rowid	True
Index	Open	Rowlabel	Type

Indexes	Option	Rownum	Union
Indicator	Or	Rowtype	Unique
Insert	Order	Run	Update
Integer	Others	Savepoint	Use
Intersect	Out	Schema	Values
Into	Package	Select	Varchar
Is	Partition	Separate	Varchar2
Level	Pctfree	Set	Variance
Like	Positive	Size	View
Limited	Pragma	Smallint	Views
Loop	Prior	Space	When
Max	Private	Sql	Where
Min	Procedure	Sqlcode	While
Minus	Public	Sqlerrm	With
Mlslabel	Raise	Start	Work
Mod	Range	Statement	Xor
Mode	Real	Stddev	

Natural	Record	Subtype	

Java

The following Java keywords cannot be used as extension names.

Abstract	Else	Interface	Switch
Assert	Enum	Long	Synchronized
Boolean	Extends	Native	Switch
Break	False	New	Synchronized
Byte	Final	Null	This
Case	Finally	Package	Throw
Catch	Float	Private	Throws
Char	For	Protected	Transient
Class	Goto	Public	True
Const	If	Return	Try
Continue	Implements	Short	Void
Default	Import	Static	Volatile
Do	Instanceof	Strictfp	While
Double	Int	Super	

Legacy Custom Field Data Migration

Migrate PowerSchool legacy custom fields to database extensions. Legacy custom fields can be mapped to extended fields and data migrated within the application using this feature. This allows all current functionality, including reports and custom pages, to continue to work and pull data from the new extended field without having to re-create the pages.

Once your user-created legacy custom fields have been migrated, you will no longer have the ability to create new custom fields in PowerSchool. Until that time, the custom fields set is dynamically updated when you access the Custom Field Data Migration page, and the Migration Report will capture all current custom fields.

Note: The legacy custom field data migration pages and processes also apply to PowerSchool state-and provincial-specific virtual table migrations.

IMPORTANT NOTE: This is a **one-time** irreversible data migration. Data in excess of 4000 1-byte (or 2000 2-byte) characters will be truncated and cannot be retrieved. Run the Migration Report to see if you have any data in this state. Back up your data before migrating.

How to Migrate Custom Fields

1. Sign in at the District Office.
2. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
3. Under Data Management, click **Page and Data Management**. The Page and Data Management page appears.
4. Under Database Management, click **Custom Field Data Migration**. The data migration page appears.
5. Choose the custom fields set you want to migrate from the pop-up menu. The following table describes the available field sets:

Field Set	Description
User_Created_Custom_Fields	This field set will migrate all user-created legacy custom fields. The content of this field set is dynamically updated each time you access the Custom Field Data Migration page until these fields have been migrated.

Core Fields	This field set will migrate 61 Pearson provided custom fields to become StudentCoreFields and UserCoreFields database extensions. For more details about Pearson provided database extensions, see the *PowerSchool Data Dictionary Tables* available on PowerSource. **Note:** This field set only displays if it has not been previously migrated.
Core Fields2	This field set will migrate all remaining custom fields that were not created by the user excluding State Reporting and Compliance fields. **Note:** This field set only displays if it has not been previously migrated.
[State Compliance Field Set]	This field set will migrate state compliance custom fields and virtual tables. If this field set is selected, the **Pre-Migration Validation** button appears. This tool allows you to preview and correct any data type issues associated with your state-specific legacy custom fields and virtual tables prior to migration. For more information, see the *Pre-Migration Data Validation Guide* located in the All States online documentation space.

6. Click **Migration Readiness Check** to check and identify any duplicate IDs and fieldno values in the FIELDSTABLE prior to migration, as well as any state-specific readiness checks deployed for your state. If any issues are found, you must contact PowerSchool Support to resolve the issue. The **Migrate Fields** button will not be enabled until the migration readiness issues are resolved and the Migration Readiness Check has passed.

   Note: If you leave the Custom Field Data Migration page for any reason, you must re-run the Migration Readiness Check before proceeding

7. Click **Migration Report**.
8. On the start page, right-click the **Report Queue** button in the navigation bar to open the queue in a new tab or window.

9. Click on **Custom Field Migration Report** to view details on the records where data will be truncated.
10. Return to the Custom Field Data Migration page.
11. Click **Get Data** to download a zip file archive of text files containing custom field data in excess of 4000 1-byte (or 2000 2-byte) characters that will be truncated when migrated. Archive the files or modify the records as needed and re-import the updates using Quick Import.
12. Re-run the migration report on the Migrate Custom Fields page to verify your changes.
13. When all applicable fields have been modified, return to the Migrate Custom Fields page.
14. On the Migrate Custom Fields page, click **Next**. The Migrate Fields section expands to display more options.
15. Click **Migrate Fields**.

    Note: If the selected migration is already running from another session/server, a message appears alerting you that the migration is already running and includes the server information.

16. Click **Next**. The Migration Summary section expands
17. When the migration is complete, summary information appears, with details on the types of records migrated, the number of records migrated, and the number of records truncated (if any).

View Migration History

To view a list of all custom fields sets that have previously been migrated, click Migration History. Each field set that has been migrated appears on the page. When the field set is migrated, it is no longer available to select on the Field Set to Migrate pop-up menu on the Choose Custom Fields Set section of the page.

Custom Field Data Automigration

Custom field data migration automatically runs at PowerSchool startup. If the automigration fails, you will need to run the Custom Field Data Migration function manually.

How to View Automigration Failed Notification

1. On the start page, click the **Notifications** button. The Notifications pop-up appears.

2. Click **Automigration has failed to pass its validation checks on startup**. The Auto-migration Failed page appears.

How to Run Custom Field Data Migration Manually

For step-by-step instructions, see *How to Migrate Custom Fields*.

At Risk Data Grid

The At Risk Data Grid is a data visualization tool that you can set up, enable, and use to quickly and easily view at risk student information for your school or district.

Setup

Risk Index Levels

District level administrators are able to configure what data displays, as well as how that data displays on the At Risk tab on the Dashboard page. A district level administrator may set the risk index point level for each at risk level tile and set the number of levels or tiles that display on the page. The at risk tiles display a count of students at each risk index level as specified. The risk index for any given student is the average of the grade risk index and the attendance risk index.

How to View Risk Index Tile Setup Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Use the following table to view information in the Risk Index Tile Setup section:

Field	Description
Risk Index Level	The name of the risk index level, which appears as a At Risk Student Count tile on the At Risk tab of the Dashboard page.
Point Value	The point value of the risk index level.
Action	The following actions that may be performed: • Click the **Delete** icon to delete a risk index level. For more information, see *How to Delete a Risk Index Level*. • Click the **Edit** icon to edit a risk index level. For more information, see *How to Edit a Risk Index Level*.

How to Add a Risk Index Level

Note: Only six risk index levels may be created at a given time.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Scroll to the Risk Index Tile Setup section.
4. Click **Add**. The Add Risk Index Level pop-up appears.
5. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of the risk index level, which appears as a At Risk Student Count tile on the At Risk tab of the Dashboard page.
Point Value Above	Enter the point value of the risk index level. **Note:** The value must be a positive number and can have up to two decimal places that is less than or equal to 4, such as 3.66.

6. Click **Submit**. The Add Risk Index Level pop-up closes and a confirmation message appears.

How to Edit a Risk Index Level

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Scroll to the Risk Index Tile Setup section.
4. Click the **Edit** icon next to the risk index level you want to edit. For field descriptions, see *How to Add a Risk Index Level*. The Edit Risk Index Level pop-up appears.
5. Click **Submit**. The Edit Risk Index Level pop-up closes and a confirmation message appears.

How to Delete a Risk Index Level

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Scroll to the Risk Index Tile Setup section.
4. Click the **Delete** icon next to the risk index level you want to delete. The Delete Confirmation pop-up appears.
5. Click **OK**. A confirmation message appears.

Risk Index Methods

District level administrators may edit an existing or create new risk index methods, which specify the risk index point percentage cutoff levels assigned for grades and attendance. The default risk index method settings described below may be changed and applied to one or many schools in the district.

The default risk index for student grades is:

- 4 Points: Percentage of Grades: At or Above 50%, Grade Scale Color Level 2/Orange (50% and Grade Scale Color Level are editable values)
- 3 Points: Percentage of Grades: At or Above 35%, Grade Scale Color Level 2/Orange (35% and Grade Scale Color Level are editable values)
- 2 Points: Percentage of Grades: At or Above 20%, Grade Scale Color Level 2/Orange (20% and Grade Scale Color Level are editable values)
- 1 Point: Percentage of Grades: At or Above 5%, Grade Scale Color Level 2/Orange (5% and Grade Scale Color Level are editable values)

Note: The default grade scale color levels are set at or below level 2/orange, which equates to grades of D and F in an A, B, C, D, F grades scale.

The default risk index for attendance is:

- 4 Points: ADA/ADM% Below 94% (where 94 is the editable value)
- 3 Points: ADA/ADM% Below 95% (where 95 is the editable value)
- 2 Points: ADA/ADM% Below 96% (where 96 is the editable value)
- 1 Points: ADA/ADM% Below 97% (where 97 is the editable value)

Note: The risk index for attendance is based on the default computation of percentage of average daily attendance/average daily membership, which represents and aggregate of student attendance at any given point.

How to View Risk Index Method Information

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.

2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Scroll to the Risk Index Method section.
4. Click **Add**. The Add Risk Index Method drawer appears.
5. Use the following table to view information in the Grades section:

Field	Description
Points	Value for each percentage cutoff level.
Percentage of Grades	For each point, the percentage of grade. **Note:** This field appears blank if a value was not entered.
Grade Scale Color Level	For each point, at or below color indicator. **Note:** This field appears blank if a value was not entered.

6. Use the following table to view information in the Attendance section:

Field	Description
Points	Value for each percentage cutoff level.
ADA/ADM %	For each point, the below percentage.

How to Add a Risk Index Method

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Scroll to the Risk Index Method section.
4. Click **Add**. The Add Risk Index Method drawer appears.
5. Enter the name of the method.
6. Use the following table to enter information in the Grades section:

Field	Description

Use in Calculation	Do one of the following: • Select the checkbox to use in grades calculation. • Deselect the checkbox to not use in grades calculation.
Points	Value for each percentage cutoff level.
Percentage of Grades	For each point, enter the percentage of grade.
Grade Scale Color Level	For each point, use the pop-up menu to indicate the at or below color: • None • (1) Red (Equates to a grade of F in an A, B, C, D, F grade scale) • (2) Orange (Equates to a grade of D in an A, B, C, D, F grade scale) • (3) Yellow (Equates to a grade of C in an A, B, C, D, F grade scale) • (4) Green (Equates to a grade of B in an A, B, C, D, F grade scale) • (5) Dark Green (Equates to a grade of A in an A, B, C, D, F grade scale)

7. Use the following table to enter information in the Attendance section:

Field	**Description**
Use in Calculation	Do one of the following: • Select the checkbox to use in attendance calculation. • Deselect the checkbox to not use in attendance calculation.
Points	Value for each percentage cutoff level.
ADA/ADM %	For each point, enter the below percentage.

8. Click **Submit**. The Add Risk Index Method drawer closes and a confirmation message appears.

How to Edit a Risk Index Method

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Scroll to the Risk Index Method section.
4. Click the **Edit** icon next to the Risk Index Method you want to edit. For field descriptions, see *How to Add a Risk Index Method*. The Edit Risk Index Method drawer appears.
5. Click **Submit**. The Edit Risk Index Method drawer closes and a confirmation message appears.

How to Delete a Risk Index Method

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears. By default, the Scores tab appears selected.
3. Click the **Edit** icon next to the Risk Index Level you want to delete. The Edit Risk Index Method drawer appears.
4. Click **Delete**.
5. Click **Confirm Delete**. A confirmation message appears.

Schools

Once risk index levels and risk index methods have been set up, you can enable the calculation and At Risk Dashboard page for selected schools.

How to Set Up Schools Using Risk Metrics

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under Analytics, click **At Risk Setup**. The At Risk Setup page appears.
3. Click the **Schools** tab. The Schools tab appears.
4. Use the following table to enter information in the Schools Using Risk Metrics filter section:

Note: By default, the Filter section appears expanded. Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	Description
School Name	To narrow the list of schools, enter the name or a portion of the school name.

Note: To remove all filter selections, click **Clear**.

5. Click **Apply**. The search results display the following information:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	Description
School Name	The name of the school.
Risk Calculation	Use the pop-up menu to select when you want the risk calculation to run:. • **Nightly** • **Weekly** **Note:** By default, **Weekly** is selected.
Risk Index Method	Use the pop-up menu to select a risk index method the school.
Last Run	The date and time the risk calculation last run.
Status	Indicates whether or not the risk calculation: • Never Run • In Process • Completed • Failed

Active	Do one of the following: • Select the checkbox to activate the At Risk Student page. • Deselect the checkbox to deactivate the At Risk Student page.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

6. Click **Submit**. A confirmation message appears.

Work with Students

Search for At Risk Students

Once set up and enabled, you can quickly and easily search for at risk student information.

Note: The Dashboard may be accessed at both the school and district level.

How to Search for At Risk Students

1. On the start page, choose **Dashboard** under Functions in the main menu. The Dashboard page appears.
2. Click the **At Risk** tab, if needed.
3. Use the following table to enter information in the At Risk Student Counts section:

Field	**Description**
[At Risk Student Counts]	Each tile is representative of a total count of students at various risk levels based on a total risk index score. By default, the first tile appears selected. Click a tile to switch to a filter.

4. Use the following table to enter information in the Filter section:

Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	Description
Risk Level	The first row of the filter displays information based on the selected tile.
Student Name	To further narrow the list of students: 1. Click the **Add (+)** button. 2. Choose **Student** from the first pop-up menu. 3. Enter the student's name or a portion of the student's name. 4. Click **Apply**. **Note:** Format must be last, first.
Grade Risk	To further narrow the list of students by grade risk: 1. Click the **Add (+)** button. 2. Choose **Grade Index** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Enter the grade risk value in the search field. 5. Click **Apply**.
Attendance Risk	To further narrow the list of students by attendance risk: 1. Click the **Add (+)** button. 2. Choose **Attendance Index** from the first pop-up menu. 3. Choose a comparator from the second pop-up. 4. Enter the attendance risk value in the search field. 5. Click **Apply**.
Risk Index	To further narrow the list of students by risk index: 1. Click the **Add (+)** button. 2. Choose **Risk Index** from the first pop-up menu.

	3. Choose a comparator from the second pop-up. 4. Enter the risk index value in the search field. 5. Click **Apply**.
Grade Level	To further narrow the list of students by grade level: 1. Click the **Add (+)** button. 2. Choose **Grade Level** from the first pop-up menu. 3. Choose a grade level from the second pop-up menu. 4. Click **Apply**.
School Name	To further narrow the list of students by school name: 1. Click the **Add (+)** button. 2. Choose **School Name** from the first pop-up menu. 3. Choose a school name from the second pop-up menu. 4. Click **Apply**. **Note:** This only appears if at the district level.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

5. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	Description
Student Name	The student's last, first name. Click to view detailed information.
Grade Level	The student's grade level.
School Name	The student's school. **Note:** This column only displays if at the district level.
Grade Risk	Grade risk indicator.

<table>
<tr><td>Attendance Risk</td><td>Attendance risk indicator.</td></tr>
<tr><td>Risk Index</td><td>Risk index indicator.</td></tr>
<tr><td>[Pagination]</td><td>Use to navigate the search results.</td></tr>
<tr><td>Rows/Page</td><td>By default, ten records display per page. To view more records per page, enter the appropriate number in the field.</td></tr>
<tr><td>Add to Current Selection</td><td>To add the filtered list of students to your current student selection, do one of the following:
Select the checkbox in the header row to select all students. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students.
Select the checkbox for each student you want to work with.
Click Add to Current Selection. A confirmation message appears.
Note: If the checkbox in the header row is selected, all records for the currently applied filters will be selected. The student selection set is retained until you set another current selection.</td></tr>
<tr><td>Set Current Selection</td><td>To make the filtered list of students your current student selection, do one of the following:
Select the checkbox in the header row to select all students. Alternately, if the checkbox is already selected, deselect the checkbox to remove the checkmarks from all students.
Select the checkbox for each student you want to work with.
Click Set Current Selection. A confirmation message appears.
Note: If the checkbox in the header row is selected, all records for the currently applied filters will be selected. The student selection set is retained until you set another current selection.</td></tr>
</table>

<table>
<tr><td>Download</td><td>To download the at risk information, click the arrow and select one of the following from the pop-up menu:
Comma-Separated Value (CSV)
Excel Spreadsheet (XLSX)
Portable Document Format (PDF) Note: A checkmark appears next to your selection. Note: The PDF format is restricted to a maximum of 1000 records. Note: Using the CSV format to download data that contains right-to-left Unicode characters may result the incorrect ordering of data. In which case, you can reconfigure your system, use a client, such as Google Sheets, or download the data in XLSX format. Note: If you have localized your version of PowerSchool, you must have the required character set installed in order to export in your specified language. </td></tr>
</table>

The Basics User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Table of Contents

Introduction

PowerSchool is an Internet-based student information system (SIS) that functions either independently or with other computer applications. Web browsers, spreadsheet programs, and other applications all work in different ways to complement PowerSchool and to provide users with robust tools for viewing, manipulating, storing, and retrieving data.

For information about other concepts related to PowerSchool, see *What Is...?*.

What is PowerSchool?

PowerSchool tracks student records and progress. School administrators and teachers enter data into the system, where it is stored. When you need to access the information, you can perform searches and run reports. Parents can monitor their children's progress and learn about school activities.

The types of information managed by PowerSchool include grades, attendance records, school schedules, class schedules, daily bulletins, lunch balances, and citizenship. All of this information is accessed through a Web browser.

What Is a PDF?

PDF is the acronym for Portable Document Format; it is the file format for Adobe System's Acrobat Reader application. You must have Acrobat Reader or a similar application installed on your computer to view PDF files. To download Acrobat Reader, see Adobe's Web site: http://www.adobe.com/products/acrobat/readstep.html.

Documents are often created in one application and then saved as PDF files because all users can read PDFs, regardless of the operating system or other applications on the user's computer. A PDF file can include any combination of text, graphics, or images. It can be one page or thousands of pages and can be very simple or extremely complex with a rich use of fonts, graphics, color, and images.

Some PowerSchool reports generate PDF files so that you can print the reports from your Web browser, Adobe Acrobat Reader, or a similar application.

What Is a Spreadsheet?

A spreadsheet is a table of values arranged in rows and columns. Examples of documents that can be spreadsheets include class rosters, transcripts, and gradebooks.

PowerSchool is unique among student information systems because you can move virtually any data from the PowerSchool system into a spreadsheet application and back into PowerSchool, if needed. This means that you can export any PowerSchool data (such as demographic information, grades, and test scores) to a spreadsheet where you can sort, filter, and perform calculations. A spreadsheet is an excellent complement to the PowerSchool system because it gives you enormous flexibility when working with and formatting data.

The most common spreadsheet applications are Excel and Lotus 1-2-3. Other well-known spreadsheet applications include Quattro Pro, ClarisWorks, and MS Works. All of these applications can be used with PowerSchool. In fact, any spreadsheet application that uses ASCII tab-delimited files can be used with PowerSchool.

What Is Importing and Exporting?

Periodically, you may need to either put a large amount of information into a system or get a large amount of information out of a system. To expedite this process, utilize the available importing and exporting tools.

Importing

Importing refers to the process by which data moves from an external application into another application, such as PowerSchool. This is helpful if you have been using another student information system and need the data in your PowerSchool system. It is also helpful if you create spreadsheets in another application and want to store that data in PowerSchool. Sometimes it may be faster to first create spreadsheets and then import the necessary data into PowerSchool rather than to enter the data into PowerSchool directly. Types of data that can be imported include student demographics, teacher, course, and scheduling data, and course requests.

The importing process involves several steps and has the potential to cause disorder in the PowerSchool database if it is not done properly. For this reason, your PowerSchool administrator or someone with equivalent experience should handle imports to the PowerSchool system. For more information about importing, see *Quick Import*.

Exporting

Exporting is the process by which data moves from an application, such as PowerSchool, into an external application, such as a spreadsheet application. This can be done easily by most PowerSchool users and provides great flexibility when formatting data. By exporting data, you can quickly prepare an honor roll list to present to your local newspaper, an attendance summary to include on a report for state auditors, or a host of other documents for just about anyone else. You may even be able to import the data back into PowerSchool after you worked with it in another application. For more information about exporting, see *Quick Export*.

What Does an Asterisk Next to a Field Mean?

An asterisk next to a field indicates that a value for that field is required.

Get Started

Sign In to PowerSchool

Before working in PowerSchool, you are required to sign in with your username and password. Everyone who uses PowerSchool must have a confidential password. Do not share your password with anyone. Doing so compromises the security of your PowerSchool system.

In addition, it is best to memorize your password. If you think you will not remember it and must write it down, keep it in a secure place where no one else will find it. Imagine the problems if a student accesses PowerSchool with your username and password!

The last component of PowerSchool security is the assigned level of access. In addition to assigning passwords, your PowerSchool administrator also assigns appropriate levels of access to PowerSchool users. No one must be allowed access to more information than necessary. Different groups of users have different levels of access to perform different activities. A specific user's access depends on that person's job responsibilities.

Note: To access PowerLunch, you need to sign in to PowerSchool. For more information, see *PowerLunch Security*.

PowerSchool URL

PowerSchool is Web-based; therefore, the PowerSchool system at your school must have a URL that you can enter in your Web browser's address bar. If you do not know the URL of the PowerSchool system at your school, contact your PowerSchool administrator.

Username

The PowerSchool administrator at your school assigns usernames. If you are not sure of your username, contact your PowerSchool administrator.

Password

Typically, the PowerSchool administrator at your school assigns your password. When you sign in to the system, enter your password exactly as it is assigned. Spelling is important! If you do not know your password, contact your PowerSchool administrator. You cannot access PowerSchool without it. If the Password Reset Rule is enabled, you will be required to reset your password upon first signing in to PowerSchool.

Note: Do not use your colleague's password or give your password to a colleague. Security is very important in PowerSchool. For more information, see *Security*.

How to Sign In to PowerSchool

1. Open your Web browser to your school's PowerSchool URL. The Administrator Sign In page appears.
2. Use the following table to enter information in the fields:

Field	Description
Select Language	Choose the language in which you want to view PowerSchool from the pop-up menu. **Note:** If no more than one locale is configured, the pop-up menu does not appear.
Username	Enter your username.
Password	Enter your password. The characters display as asterisks (*****) to ensure greater security when you sign in.
[Server Information]	The date, time, and version number appear. Click the version number to view the Server Details pop-up, which includes the State Reporting content version number. When you are done viewing, click the **x** in the upper-right-hand corner to close.

3. Click **Sign In**. The start page appears. For more information, see *PowerSchool Start Page*.

   Notes:

   - If your PowerSchool administrator has issued you a temporary password, you may be asked to reset your password upon first signing in. For more information, see *How to Reset Your Password*.
   - If your password has expired, you may be asked to reset your password. For more information, see *How to Reset Your Password*.
   - If you have exceeded the number of sign in attempts allowed, you may become locked out of PowerSchool. If so, contact your PowerSchool administrator.

How to Reset Your Password

If your PowerSchool administrator has issued you a temporary password or if your password has expired, use this procedure to reset your password.

Note: This procedure is only available if the Password Reset Rule or the Password Expiration Rule is enabled.

1. Sign in to PowerSchool. The Change Your Password page appears.
2. Use the following table to enter information in the fields:

Field	**Description**
Current Password	Enter your current password.
New Password	Enter a new password. If your school has established password complexity rules, password requirements will display. Enter your password based upon these requirements. **Note:** It is important to select a new password that you will remember. If you forget it, you cannot sign in to PowerSchool without help from your PowerSchool administrator. It is not recommended that you write down your password because an unauthorized user could find it and gain access to PowerSchool. Try to commit your password to memory.
Re-Enter New Password	Enter your new password again exactly as you entered it in the above field.

3. Click **Enter**. The start page appears. For more information, see *PowerSchool Start Page*.

   Note: If one of the following messages appears, re-enter your password accordingly:

   - Current password is not correct.
   - New password must be at least [number] characters long.
   - New password must contain at least one uppercase and one lowercase letter.
   - New password must contain at least one letter and one number.
   - New password must contain at least one special character.
   - The verification password you enter must match the new password.

- The password entered was previously used. Please enter a new password.

The next time you sign in to PowerSchool, use your new password.

How to Sign In After Session Times Out

If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

Note: In order to reload/restore the last page you were viewing/using, you must be using the same computer, same HTML5-compatible browser, and same portal. Additionally, if another user signs in after your session has timed out, your previous session cannot be reloaded/restored.

1. If the You have been signed out. Return to Sign In Page. pop-up appears, click **Sign In Page**. The Administrator Sign In page appears.
2. Sign in. Depending on what page of PowerSchool you were last using, one of the following pop-ups appear:
   - Reload Last Page - Your session timed out due to inactivity. Would you like to restore your previous session and reload the last page you were viewing?
   - Restore Selections(s), School and Term - Your session timed out due to inactivity. Would you like to restore your previous session and return to the last used school, term, student and/or teacher selection?
3. Do one of the following:
   - Click **Yes** to reload/restore the last page you were viewing/using.
   - Click **No** to sign in and access the start page.

PowerSchool Start Page

When you sign in to PowerSchool, the start page appears. This page serves as the central point from which you begin your PowerSchool session. The start page consists of the following main areas:

- Header
- Navigation Toolbar
- Main Menu
- Main Page

Header

The header appears at the top of PowerSchool. The header includes the following information:

Note: To hide the header, click the **Hide Header** arrow. This also affects **School** and **Term** in the navigation bar. Click again (now the **Show Header** arrow) to display the header. This setting is retained as you move through PowerSchool.

Field	**Description**
PowerSchool	Click to return to the start page from anywhere within the application.
Welcome, [Your Name]	The first and last name of the person signed in. Your name should appear. If it does not, contact your school's PowerSchool administrator.
Help	Click to access the PowerSchool online help. Assistance is just a click away! For more information, see *Help*.
Sign Out	Click to sign out of PowerSchool.

Navigation Toolbar

The navigation toolbar appears at the top of the start page and is common to every page in the application. The navigation toolbar includes the following information:

Field	**Description**
School	The name of your default school (or district) appears. If you have access to more than one school (or district), you can click the link to choose another school. Before beginning any PowerSchool procedure, be sure the school (or district) in which you want to work appears. **Note:** In order to activate the **School** link, more than one **May switch to** school checkbox must be selected when assigning security permission. In order for District Office to appear in the pop-up menu, the **May switch to** district office checkbox must be selected when assigning security permission. Security permission may be assigned for individual users using the Security Settings page (see *Security Permissions*) or for user groups using the Edit Staff Security Info page (see *Group Security Permissions*).

	Note: When changing schools, the matching term abbreviation is selected. If there is no matching term abbreviation, then the school's default term level is selected. To set the term based on the schools default term level, see *How to Set Up Miscellaneous District Settings*. **How to Change Schools** 1. Click **School**. The Schools pop-up menu appears. **Note:** You can enter the first couple of letters of the school or district to take you to a specific menu item. 2. Choose the appropriate school name or choose **District Office** from the **School** pop-up menu. The navigation toolbar displays the name of the selected school. **Note:** Switching schools cancels any selection of students made in the previous school.
Term	Before beginning any PowerSchool procedure, be sure the term in which you want to work appears. By default, the current term appears when the server date falls within a scheduling term. If the server date does not fall within a scheduling term, the term defaults to the **Default Term When Between School Years** setting. For more information, see *Miscellaneous District Settings*. **How to Change Terms** 1. Click **Term**. The Term pop-up menu appears. 2. Choose the term from the **Change To** pop-up menu. The navigation toolbar displays the name of the selected term.
[Verify # of school days in this term Icon]	When changing terms, this icon appears next the Term pop-up menu. Click to view the number of school days in the currently selected term. When you are done viewing, click the **x** in the upper-right-hand corner to close.
[Navigation Path]	PowerSchool provides a navigational tool called a navigation path. As you navigate through the application, the navigation path

	appears at the top of a page, providing links back to each previous page that you navigated through. Click any of the links in the navigation path to access that particular page of the application. **Note:** These navigational links are often referred to as "breadcrumbs" because the navigation path displays each step you made to reach your current page. Click a link in the navigation path to backtrack to a previous page.
[Applications Button]	1. Click the button (an upward-right arrow). The Applications drawer slides into view. 2. Click the **Application** link you want to launch. The application launches in a separate window (or tab depending on your browser settings). **Note:** The window that appears is not served by PowerSchool. It is rendered from a separate server. If the window does not launch, contact your school's PowerSchool administrator **Note:** If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again. 3. When you are finished working in the application, be sure to sign out of the application. 4. When you are finished working in PowerSchool, be sure to sign out of the PowerSchool. **Note:** This button only appears if a plugin has been installed and enabled and you have been granted access to the plugin. For more information, see *Plugin Management Dashboard*.
[Localize Page Button]	Click the button (a circular arrows with an "a" and alpha symbol) to access the Localize Page pop-up. For more information, see *Localization Individual Pages*. **Note:** This button only appears if enabled and you have the proper security permissions.

[Notifications Button]	If the selected school has any notifications requiring attention, the number of notifications appears next to the button. Click the button (an exclamation point) to access the Notifications pop-up. The Password Security section displays the date and time of the last time you signed in. The display appears when you hover over your name. This information can be used to alert you to any unusual account activity. If you experience any unusual account activity, report it to your school.
[Report Queue Button]	The report queue is a list of all reports, including pending, running, completed, and canceled report requests. When you submit a report request to the system, the system captures that request and transmits it to the report queue. The queue displays all reports until each report ages beyond a specified number of days. Depending on the status of the report and the permissions of the user, reports can be canceled, deleted, or run again. Click the button (a piece of paper) to display any report requests or "jobs" you have any jobs in the queue. If any of the jobs are currently running, the button displays animated writing on the paper button. For more information, see *Report Queue*.
[Printer Button]	Click the button (a printer) to print a printer-friendly version of the page you are viewing. Additionally, the page includes the name of the selected student and the school and school district for that student. **Note**: Web pages or reports that exceed the normal portrait orientation can be printed in landscape or adjusted to fit the page. On Mac systems, if your browser does not support those options, click **Preview** on the browser's Print Options dialog, then use the expanded printing options available in Preview to print the page.

Main Menu

The main menu appears in the vertical frame on the left side of the page and is divided into five functional areas and includes links to the following:

Note: To hide the main menu, click the **Hide Main Menu** arrow. Click again (now the **Show Main Menu** arrow) to display the main menu. This setting is retained as you move through PowerSchool.

Note: You may not have access to some of the functions, or you may have view-only permissions.

Functions

Field	Description
Attendance	Click to access the Attendance menu where you can perform a variety of attendance procedures.
Daily Bulletin	Click to view the daily bulletin of the selected district or school. For more information, see *Daily Bulletin*.
Enrollment Summary	Click to view a breakdown of students by ethnicity and grade. For more information, see *Enrollment Summary*.
Master Schedule	Click to define master schedule preferences. For more information, see *Master Schedule Preferences*.
Dashboard	Click to access a Flash-based view of a broad range of data for the district or selected school. For more information, see *Dashboard*.
Special Functions	Click to access the Special Functions menu where you can perform a variety of specialized procedures. For more information, see the online help for particular special function you are performing.
Teacher Schedules	Click to view the current schedule of the selected teacher. For more information, see *Teacher Schedules*.

Reports

Field	Description
System Reports	Click to access Reports menu where you can perform a variety of reporting procedures. For more information, see *Custom Reports*

	and *Preconfigured Reports*. Additionally, use this link for state reporting and reporting engine functions.
ReportWorks	ReportWorks is an application that can be used with PowerSchool and other student information systems that provides the tools to give report developers an easy way to find, evaluate, and share information. Click to launch the application in a new window. If you have a ReportWorks account that is linked to your PowerSchool account, you will be signed in to automatically. Otherwise, the ReportWorks sign in page appears.

People

Field	Description
Student Search	Click to search for students. For more information, see *Student Search*. **Note:** For information about the **Advanced** or **Include Remote Enrollments** checkboxes, see *Search Students Page*.
Staff Search	Click to search for staff members at your school, to view demographic information about a selected staff member, or make changes to a staff member's record. For more information, see *Staff Search*.
Contact Search	Click to search for contacts. For more information, see *Contact Search*.
Enroll New Student	Click to enroll a student into your school. For more information, see *Work with an Individual Student*.
New Contact Entry	Click to add a new contact to your school. For more information, see *New Contacts*.
New Staff Entry	Click to add a new staff member to your school. For more information, see *How to Add a New User*.

Setup

Field	Description
District	Click to access the District Setup menu where you can set up district information. Typically, your PowerSchool administrator uses the option. For more information, contact your PowerSchool administrator. **Note:** You must be signed in to the district office in order to see this link. For more information, see *How to Change Schools*.
School	Click to access the School Setup menu where you can set up information for the selected school. Typically, your PowerSchool administrator uses the option. For more information, contact your PowerSchool administrator. **Note:** You must be signed in to a school in order to see this link. For more information, see *How to Change Schools*.
System	Click to access the System Administrator menu where you can perform a variety of setup and system maintenance procedures. Typically, your PowerSchool administrator uses this option. For more information, contact your PowerSchool administrator.
Personalize	Click to access the Personalize menu where you can customize your PowerSchool settings. For more information, see *Personalize*.

Applications

Field	Description
PowerLunch	Click to access PowerLunch menu where you can perform a variety of lunch management procedures. For more information, see *PowerLunch*.
PowerScheduler	When in school mode, click to access the PowerScheduler menu where you can prepare, build, load and commit your master

	schedule. For more information, see *Master Schedule Overview*, *Prepare to Build the Master Schedule*, *Build Master Schedule Introduction*, or *Master Schedule Reports*. **Note:** You must be signed in to a school in order to see this link. For more information, see *How to Change Schools*.
PS Administrator	PowerSchool Administrator is an application that can be used with PowerSchool and other student information systems intended to help you monitor and maintain the PowerSchool system. It includes the ability to view drive information, schedule backups, and manage custom pages. Click to launch the application in a new window. If you have a PowerSchool Administrator account that is linked to your PowerSchool account, you will be signed in to automatically. Otherwise, the PowerSchool Administrator sign in page appears.
PT Administrator	PowerTeacher Administrator is an application that can be used with PowerSchool and other student information systems to complete and distribute gradebook information to a number of teachers, thereby maintaining organization and minimizing teachers' workloads. Click to launch the application in a new window. If you have a PowerTeacher Administrator account that is linked to your PowerSchool account, you will be signed in to automatically. Otherwise, the PowerTeacher Administrator sign in page appears.
ReportWorks Developer	Click to access the Launch ReportWorks page. For more information, see *Launch Reportworks*.
Schoolnet	Click to launch Schoolnet. For more information, see *Launch Schoolnet in PowerSchool*.
[Plugin]	1. Click the link you want to launch. The application launches in a separate window (or tab depending on your browser settings). **Note:** The window that appears is not served by PowerSchool. It is rendered from a separate server. If the

	window does not launch, contact your school's PowerSchool administrator **Note:** If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again. 2. When you are finished working in the application, be sure to sign out of the application. 3. When you are finished working in PowerSchool, be sure to sign out of the PowerSchool. **Note:** A plugin link only appears if a plugin has been installed and enabled and you have been granted access to the plugin. For more information, see *Plugin Management Dashboard*.

Main Page

The main page includes the following information:

Field	**Description**
Search	Use the search tabs to search for students, staff, or contacts. Do one of the following: • Click **Students** to search for students. By default this tab is selected. For more information, see *Student Search*. • Click **Staff** to search for staff members. For more information, see *Staff Search*. • Click **Contacts** to search for contacts. For more information, see *Contact Search*. **Note:** Information that appears in this section is based on the type of search you are performing.
What's New	Click **Read More...** to see what's new in the latest feature release of PowerSchool.

Work with the Main Menu

Smart Search

In order to help you get the search result you want faster, you can enable Smart Search. Smart Search works in conjunction with the Search Student and Search Staff fields on the PowerSchool Start Page. When enabled, as you enter your search criteria, PowerSchool automatically provides a drop-down list of suggestions that you may choose from, including students, staff, stored searches, fields, and PowerSchool page names. Suggestions provide the following visual cues as to the type of the suggestion:

Result Type	Icon	Text Color
Students		Orange
Staff		Orange
Stored Searches		Green
Fields		Black
PowerSchool Page Names		Blue

Note: Suggestions are dependent upon how Smart Search is enabled, as well as whether you are searching for students or staff.

How to Enable Smart Search

In order to make Smart Search available for users to turn on and off, you must enable Smart Search at the district level.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Miscellaneous**. The Miscellaneous page appears.
3. Select the **Enable Smart Search** checkbox.
4. Click **Submit**. The Changes Recorded page appears.

How to Disable Smart Search

Once you have enabled Smart Search, later you may find it necessary to disable it. Although Smart Search then is no longer available to users, users' personalized Smart Search settings are retained.

1. On the start page, choose **District** under Setup in the main menu. The District Setup page appears.
2. Under District Information, click **Miscellaneous**. The Miscellaneous page appears.
3. Deselect the **Enable Smart Search** checkbox.
4. Click **Submit**. The Changes Recorded page appears.

How to Personalize Smart Search

If Smart Search is enabled, each PowerSchool user can then opt to turn Smart Search or off at any time.

1. On the start page, choose **Personalize** under Setup in the main menu. The Personalize page appears.
2. Click **Interface**. The Personalize - Interface page appears.
3. Select the **Enable Smart Search** checkbox. Alternately, deselect the checkbox to disable this feature.
4. Select the **Include Page Results** checkbox to make those PowerSchool pages that are accessible to you searchable. Otherwise, leave the checkbox blank.
5. Select the **Include Inactive Student/Staff Results** checkbox to make inactive students and staff searchable. Otherwise, leave the checkbox blank.
6. Click **Submit**. The Changes Recorded page appears.

Daily Bulletin

Certain users can view and add items to the school's daily bulletin. Not all users at all schools have permission to create items for the bulletin, but everyone, including parents and students, can view the notices. For information about daily bulletin setup, see *Daily Bulletin Setup*.

How to View the Daily Bulletin

1. On the start page, choose **Daily Bulletin** under Functions in the main menu. The View Daily Bulletin pop-up window appears.

   Note: If the Default Sign In Page is set to Daily Bulletin, the daily bulletin appears as a page. For more information, see *How to Set the Default Sign In Page*.

2. Do one of the following:

- Click the **Calendar** icon to select a date to view the bulletin for that day. On the calendar, dates that are shaded light blue have a daily bulletin associated to them, the current date is shaded with a dark blue, and the selected date displays with a border. Use the arrow buttons to navigate to a different month.
- Click the email address to send a message to the person who creates items for the daily bulletin. Send either an announcement to contribute to the bulletin or a message to the bulletin administrator. For more information, contact your PowerSchool administrator.

3. When done viewing, close the View Daily Bulletin pop-up window.

Master Schedule

Use this page to display the schedule for all teachers in your school. You can either view all meetings for all sections and teachers or select certain teachers, days, and periods.

How to Set Master Schedule Preferences

The first time you access the master schedule, you must set your master schedule preferences. The master schedule can be filtered by periods, days, credit type, rooms, and teachers. Preferences are associated with each user account. Therefore, your preferences will appear when you sign in to any computer with your username and password. Once you have set your master schedule preferences, you can view or modify them at any time using the **Show Preferences** link.

1. On the start page, choose **Master Schedule** under Functions in the main menu. The Master Schedule Preferences page appears.

   Note: If the master schedule appears, click **Show Preferences** at the bottom of the page. The Master Schedule Preferences page appears.

2. Use the following table to enter information in the fields:

Field	Description
Periods	Select the checkboxes to indicate which periods to display on the master schedule. To display all periods, select the **All Periods** checkbox.

Days	Select the checkboxes to indicate which days to display on the master schedule. To display all days, select the **All Days** checkbox.
Credit Type	Enter the credit type to indicate which credit type to display on the master schedule, such as **MATH**. To display all credit types, do not enter anything in the field.
Rooms	Select the rooms to display on the master schedule. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. Select **All Rooms** to display all rooms.
Teachers	Select the teachers to display on the master schedule. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. Select **All Teachers** to display all teachers.
Sort By	Select a sort order option for the master schedule: • **Course Name** • **Credit Type** • **Department** • **Room** • **Teachers**
View By	Select whether you want to view the master schedule in a **Matrix** (grid) or **List** format. **Note:** In order to access the Class Roster page from the Master Schedule page, this setting must be set to **Matrix**. For more information, see *How to View the Class Roster From the Master Schedule Page*.

3. Click **Submit**. The Master Schedule page displays the information for the selected options.

How to View the Master Schedule

View the master schedule for all teachers for all meetings.

1. On the start page, choose **Master Schedule** under Functions in the main menu. The Master Schedule page displays all classes for each teacher and the number of students in each class.

   Note: If the Master Schedule Preferences page appears, you must first set your master schedule preferences. For more information, see *How to Set Master Schedule Preferences*.

2. Use the following table to view information on this page:

Field	Description
Teacher	The name of the selected teacher appears.
Day	Days (or cycle) the course meets.
Period	For each period, the following information appears: • Course Name • Course. Section - Click to edit section information. For more information, see *Sections*. Click **Back** on your browser to return to the Master Schedule page. • Enrollment - Click to view the Class Roster. For more information, see *Class Roster*. • Expression • Term
Show Preferences	Click to view or modify your master schedule preferences. For more information, see *How to Set Master Schedule Preferences*.

3. When finished, click the **PowerSchool** logo to return to the start page.

Teacher Schedules

Use this page to view the current schedule of a selected teacher.

How to View Teacher Schedules From the Main Menu

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. On the Teacher Schedule page, you can do the following:

Field	**Description**
New	Click to add a section to the teacher's schedule. The Create New Section page appears. For more information, see *How to Add Sections to Teacher Schedules*.
Term	Click to view term information for this section. The Term page appears.
Course	Click the name of the course to view basic course information. The Course Information page appears.
Section #	Click to view information about this section. The Edit Section page appears. For more information, see *Sections*.
Enrollment	Click to display the section's class roster. The Class Roster page appears. For more information, see *How to View the Class Roster*.
Analytics	Click to view Analytics data. For more information, see *View Analytics Data*. **Note:** The Analytics icon only appears if Analytics is enabled. For more information, see *Enable Analytics*. **Note:** The data that appears on the graph is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.
Lock	An icon appears to display the reporting term lock status for this section. The legend at the bottom of the page indicates the different status icons. If some of the reporting terms for the section are locked, you can click the blue information icon to view

	the status of the different reporting terms associated to the section. If the section is associated with PowerTeacher Gradebook, N/A-PTG appears in the field. If the section is manually locked or unlocked, you can hover over the icon to view the expiration date for the setting.
Make all student listed above the current selection	Click to work with the group of students in all of the selected teacher's classes listed in the schedule. The Group Functions page appears. For more information, see *Work with Groups*.
Unlock Selected Sections	Use the selection menu to choose whether to lock or unlock selected sections. For more information, see *How to Manually Lock and Unlock Sections*.

Personalize

You can customize PowerSchool to meet your needs and preferences. Preferences can be changed at any time, or you can use the default settings. Change any combination of the settings as often as you want.

How to Change Your Password

1. On the start page, choose **Personalize** under Setup in the main menu. The Personalize page appears.
2. Click **Change Password**. The Personalize - Change Password page appears.
3. Use the following table to enter information in the fields:

Field	Description
Old Password	Enter your current password.
New Password	Enter a new password. If your school has established password complexity rules, password requirements will display. Enter your password based upon these requirements. **Note:** It is important to select a new password that you will remember. If you forget it, you cannot sign in to PowerSchool

	without help from your PowerSchool administrator; this will delay your work. It is not recommended that you write down your password because an unauthorized user could find it and gain access to PowerSchool. Try to commit your password to memory.
Verify New Password	Enter your new password again exactly as you entered it in the above field.

4. Click **Submit**. The Changes Recorded page appears.

   Note: If one of the following alert messages appears, click **Back** and re-enter your password accordingly:

   - Current password is not correct.

     Note: There are only a certain number of times you may enter an incorrect password before being locked out. If you become locked out, contact your school directly for assistance.

   - New password must be at least [number] characters long.
   - New password must contain at least one uppercase and one lowercase letter.
   - New password must contain at least one letter and one number.
   - New password must contain at least one special character.
   - The verification password you enter must match the new password.
   - The password entered was previously used. Please enter a new password.

   The next time you sign in to PowerSchool, use your new password.

How to Set the Default Sign In Page

Personalize the default page that appears after you sign in to PowerSchool.

1. On the start page, choose **Personalize** under Setup in the main menu. The Personalize page appears.
2. Click **Default Sign In Page**. The Personalize - Default Sign In Page appears.
3. Select an option to indicate your preferred Default Sign In page:
   - Choose a standard page from the first pop-up menu.

- Enter a valid PowerSchool page name in the second pop-up menu. To determine the page name, navigate to that page. Copy the URL from the Location or Address field on your Web browser and paste it into this field.

4. Click **Submi**t. The Changes Recorded page appears. The next time you sign in to PowerSchool, the system opens to the page you chose.

How to Set the Default Student Page

Personalize the default page when working with a student.

1. On the start page, choose **Personalize** under Setup in the main menu. The Personalize page appears.
2. Click **Initial Student Screen**. The Personalize - Initial Student Screen page appears.
3. Choose an initial student screen from the pop-up menu. This will be the default page that appears when you select a student record.
4. Click **Submit**. The Changes Recorded page appears. The next time you select a student, the student page you chose will appear.

   Note: After selecting a student, the default student page appears unless you viewed a different student page since you signed in to PowerSchool. For more information, see *Work with an Individual Student*.

How to Personalize Your PowerSchool Interface

1. On the start page, choose **Personalize** under Setup in the main menu. The Personalize page appears.
2. Click **Interface**. The Personalize - Interface page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Hide left navigation menu	If you do not want the main menu on every PowerSchool page, you can select a preference to hide the main menu from all pages except the start page. To navigate in PowerSchool without using the main menu, use the navigation path or "breadcrumbs." Select the checkbox to hide the Main Menu. Alternately, deselect the checkbox to show the Main Menu.
Enable task navigator	The Task Navigator is a tool that provides process-oriented help for certain complex tasks. The Task Navigator can be enabled or

	disabled, depending on each user's preference. When enabled, the Task Navigator appears as a frame in the lower left of pages in PowerSchool that include task navigation. The Task Navigator displays a list of defined processes and the order in which they should be performed, depending on the page being viewed. Select the checkbox to enable Task Navigator. Alternately, deselect the checkbox to disable Task Navigator.
[Smart Search]	For more information, see *Smart Search*.

4. Click **Submit**. The Changes Recorded page appears.

Dashboard

The Dashboard, accessible at both the district and school level, provides you with an instant view of a broad range of data in a concise, graphical format. Each chart, or widget, can be added or removed to customize the data that appears on your Dashboard.

Depending on your system configuration and how you sign in to PowerSchool, two or three tabs appear on the page.

Tab	Description
Sever	Displays server information widgets.
School	Displays school information widgets. This tab appears if signed in to PowerSchool at the school level.
District	Displays district information widget. This tab appears if signed in to PowerSchool at the district level.
Analytics	Displays the Analytics Dashboard. **Note**: You must have access to view the Analytics Dashboard. For more information, see *How to Enable Analytics*. **Note**: The data that appears on the page is not served by PowerSchool. It is rendered from a separate Analytics server. For

	more information on the configuration of Analytics, see the Analytics documentation.

How to Add Widgets to the Dashboard

1. On the start page, choose **Dashboard** under Functions in the main menu. The Dashboard page appears.

   Note: By default, all of the available widgets display on the Dashboard.

2. Use the pop-up menu to choose the widget you want to add.
3. Click **Add Widget**. The widget opens, and the other widgets reorganize on the page.

   The following widgets are available on the Server Dashboard:

Widget	**Description**
Server Processes Status	Displays server uptime, PowerSchool uptime, and status of the Task Server, Web Server, Communication Server, and Log Process.
Average Server Sign Ins	Displays the average number of server log-ins per hour.
Server Report Queue Jobs	Displays the current report queue status, the number of report processes, result file location, and a bar chart indicating the current, pending, canceled, and completed report queue jobs.
Server Handlers	Displays total number of busy and dormant handlers.
Server Memory	Displays amount of installed RAM, virtual memory status, and PowerSchool free memory.
Server Volume	Displays information on physical disk space, PowerSchool installed file path, hard disk size, used space, and free space.
Server Hits	A pie chart that displays the number of Web requests for the Admin Teacher and Public portals of PowerSchool.

The following widgets are available on the District Dashboard:

Widget	Description
Active Students Per School	Displays the total number of active enrollments at each school in the district.

The following widgets are available on the School Dashboard:

Widget	Description
School Enrollment Trend	Displays active enrollments for each month of the current school year. The total number includes students who were added and excludes those that were dropped in a given month.
School Membership Trend	Displays total membership for each month of the school year, based on days in session and student enrollment.
Programs Active Enrollments	Displays the active enrollments in special programs.
In Session Days	Displays the number of days school is in session during each month and provides links to the Calendar Setup page.

How to Remove Widgets from the Dashboard

1. On the start page, choose **Dashboard** under Functions in the main menu. The Dashboard page appears.
2. Click the applicable Dashboard tab (Server, School or District).
3. Click the **X** in the upper right corner on the specific widget you want to remove. The widget closes, and the title of the removed widget appears in the pop-up menu located on the Dashboard page. The remaining widgets reorganize on the page.

Quit PowerSchool

When finished working in PowerSchool, it is important to sign out of the application.

Sign Out of PowerSchool

You can sign out of PowerSchool from any page in the application.

Note: If you are not actively working in PowerSchool, your session may time out. If so, you need to sign in again.

How to Sign Out of PowerSchool

Click **Sign Out** in the header. The Administrator Sign In page appears.

Need Assistance?

PowerSchool provides a number of resources that provide additional information about the application. Available resources include:

- PowerSchool Online Help
- PowerSource
- User Guides
- State Reporting documentation
- Release Notes
- Email

PowerSchool Online Help

Use PowerSchool online help to learn about the PowerSchool Student Information System (SIS), to serve as a reference for your daily work, and to assist you in navigating through the system.

You are encouraged to read each section of the online help that pertains to you. While the introductory sections build a foundation of knowledge that you will use every time you sign in to PowerSchool, the remaining sections are independent of each other and can be read in any order.

PowerSchool online help is updated as PowerSchool is updated. For the most up-to-date information, click **Help** on any page in PowerSchool, and then select **System Help**.

PowerSchool State/Provincial Reporting Online Help

All documentation related to your state or province reporting is now available in an online, searchable format. Simply click **Help** on any page in PowerSchool, and then select **State Reporting Help** (US) or **Provincial Reporting Help** (Canada).

PowerSource

PowerSource is a support Web site that offers a wealth of information, including documentation, user forums, and knowledgebase articles. The address for this site is https://support.powerschool.com. Be sure to bookmark this Web site for future use.

Note: You will need a username and password to sign in. If you do not have a username and password, contact your PowerSchool administrator.

User Guides

User guides that include the same information as PowerSchool online help are available for each major release of PowerSchool. These user guides include instructions for user roles which will vary depending on your school's or your district's circumstances. For the most recent version of the user guides in Portable Document Format (PDF), visit PowerSource. You will need your username and password to sign in. If you do not have this information, contact your PowerSchool administrator. Once you are signed in, navigate to **Support > Documentation > PowerSchool > User Guides**. The user guides are organized by the PowerSchool release version.

Whenever you read a user guide, keep the following points in mind:

- Review the headings within the table of contents to locate the sections specific to your needs.
- The actions you can perform in PowerSchool depend on your job responsibilities and subsequently on your level of access to PowerSchool. Some users have only viewing rights to some pages. Other users can view or edit any page. Still other users can view or edit any page and create new pages as well. And finally, some pages are view-only for everyone. This guide outlines viewing, editing, and creating options for most pages. Your needs and your level of access determine which options will be applicable and available to you. If you find that your work requires a greater level of access, contact the PowerSchool administrator at your school.
- Almost all of the activities described in a user guide begin by selecting the appropriate student or group; thus, it is imperative that you understand how to search for and select a student. For more information, see *Student Search*.
- The school and student records used in a user guide differ from those that appear on your page as you work. You will work with real data based on student records at your school. The examples in a user guide are only illustrations or suggestions.
- In PowerSchool, different pages provide some of the same information because you view the same data from a different place each time. If you add, change, or delete data on one page, it will be added, changed, or deleted on other pages that contain the same fields of data.
- The reports described in a user guide may be some of the most important tools you will use in the system. A PowerSchool report is a statement of student or staff records that is produced for viewing or printing and can include information text in addition to the report listings. PowerSchool reports include report cards, lists of class schedules, lunch balance sheets, mailing labels, lists of current staff members, and attendance records.
- Use PowerSchool to create numerous types of reports that pull selected data. Select from a list of preconfigured reports that have preset parameters or create a custom report to include parameters needed for a specific task. Read the sections *System Reports* and *Custom Reports* before creating a report.

State Reporting

For state reporting documentation, see *PowerSchool State/Provincial Reporting Online Help*.

Release Notes

To learn more about a specific release, visit PowerSource and navigate to **Support > Documentation > PowerSchool > Release Notes**, and locate the version of PowerSchool you would like to read about.

Email

Ask your question by sending an email message to: PowerSchoolSupport@Pearson.com.

Visual Scheduler User Guide

PowerSchool

Student Information System

PowerSchool

Released April 2018

Document Owner: Documentation Services

This edition applies to Release 12.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Next Steps........ 38
When to Commit the Master Schedule........ 38

Introduction

The Visual Scheduler provides PowerSchool Scheduling administrators the ability to create the master schedule using drag-and-drop capabilities. The Visual Scheduler functionality incorporates the scheduling principles presented in PowerSchool's Master Schedule Build Workshop, including satisfying student course requests, balancing classes, and satisfying teacher schedule requests.

The Visual Scheduler is built into PowerSchool, so there is no need to reenter your teachers, students, or courses data, saving you time. Use the PowerScheduler engine to build your initial schedule and the Visual Scheduler to make final adjustments. Or, build your entire schedule with the Visual Scheduler. Try out as many scheduling scenarios as you'd like, and once you are satisfied with your schedule, you can make it available for your school in just a few simple steps.

Setup

Before you can begin using the Visual Scheduler, you must perform the following setup items:

Note: For detailed information about each of these procedures, see the PowerSchool online help.

Security

Assign your Visual Scheduler users to a security group for which PowerScheduler access is enabled.

How to Set Up Security

1. To set up **PowerScheduler access**, navigate to **System** > **Security Groups** > Choose a Group > Select the **PowerScheduler Access** checkbox > **Submit**.
2. To assign users to a security group, navigate to **Staff Search** > Select a Staff Member > **Security Settings** > Choose the appropriate group from the **Group** pop-up menu > **Submit**.

Teachers

Set the required scheduling fields for each teacher that you want to schedule.

How to Set Up Required Scheduling Fields for Teachers

To set **Schedule This Teacher**, navigate to **Staff Search** > **Teachers** > Select a Teacher > Select the **Schedule This Teacher** checkbox > **Submit**.

Students

Set the required scheduling fields for each student that you want to schedule.

How to Set Up Required Scheduling Fields for Students

To set the required scheduling fields, navigate to **Student Search** > Select a Student > **Scheduling Setup** > Enter the appropriate information for **Next Year Grade**, **Priority**, **Schedule This Student**, **Year of Graduation**, and **Next School Indicator** > **Submit**.

Years & Terms

Set up **Years & Terms** for the year that you wish to create your schedule for. If Years & Terms are not established for the year you wish to schedule for, you will need to set up Years & Terms.

How to Set Up Years & Terms

1. To determine if you have set up Years & Terms, navigate to **PowerScheduler** > **Years & Terms** > Note the school year start and end dates > Click **Edit Terms** for the school year > Note the start and end dates for each term.
2. To set up Years & Terms, navigate to **PowerScheduler** > **Years & Terms** > **New** > Enter information as needed > **Submit** > **Edit Terms** > Enter one or more terms (sequentially) as appropriate for your school schedule > **Submit**.

Schedule Year

Set the Schedule Year for the year that you want to create your schedule for.

How to Set Up the Schedule Year

To set the Schedule Year, navigate to **PowerScheduler** > **Functions** > **Set Schedule Year** > Choose the appropriate schedule year from the **Year** pop-up menu > **Submit**.

Scenario

Set up an active Scenario. If no active scenario is listed, you may either activate an existing scenario or create a new one.

How to Set Up an Active Scenario

1. To determine if you have an active scenario, navigate to **PowerScheduler** > Note the **Status** column.

   Note: Only one scenario can be active at a given time.

2. To create a new scenario, navigate to **PowerScheduler** > **Scenarios** > **New** > Enter information as needed > **Submit**.
3. To make a scenario active, navigate to **PowerScheduler** > **Scenarios** > Click the name of the scenario > Select **Active Build** > **Submit**.

Course Catalog

Set up an active Course Catalog and associate the course catalog to the active scenario.

How to Set Up an Active Course Catalog

1. To determine if you have an active course catalog, navigate to **PowerScheduler** > **Course Catalogs** > Note the **Status** column.

   Note: Only one course catalog can be active at a given time.

2. To create a new catalog, navigate to **PowerScheduler** > **Course Catalogs** > **New** > Enter information as needed > **Submit**.
3. To make a catalog active, navigate to **PowerScheduler** > **Scenarios** > Click the name of the active scenario > Choose the catalog you want to be active from the **Course Catalog** pop-up menu > **Submit**.
4. To change the courses that are associated with the active course catalog, navigate to **PowerScheduler** > **Course Catalogs** > **Edit Course Catalog** > Select the checkbox next to a course name to include it in the course catalog > **Submit**.

Valid Terms

Set the **Valid Terms** for each course. The Visual Scheduler requires this information for each course as the term determines the size of the section tile and the term value determines where a section can be placed. For example, a course that occurs in Semester 1 only will display in the top half of a section cell and can only be placed in the top half.

Note: There are several methods to set this value.

How to Set Valid Terms

Do any of the following:

- To set Valid Terms manually for a single course, navigate to **PowerScheduler** > **Courses** > Choose a Course > **Preferences** > Click **Associate** next to Valid Terms > Select the Valid Terms > **Submit** > **Submit**.
- To set Valid Terms to be the same for one or more courses, navigate to **PowerScheduler** > **Functions** > **Auto Fill Course Information** > Click **Associate** next to Valid Terms > Select the Valid Terms > **Submit** > **Submit**.
- To set Valid Terms based upon the current active master schedule, navigate to **PowerScheduler** > **Functions** > **Auto Generate Course Information** > **Select checkbox to verify the command** > **Submit**.

Target Number of Sections to Offer

Set the **Target Number of Sections to Offer** for each course. The Visual Scheduler does not require this information, but it is useful to determine if there are any unscheduled sections remaining to be scheduled. Additionally, if you gather course requests and want to use the Seats Available per Grade Level function, then the Target Number of Sections to Offer is needed.

Note: There are several methods to set this value.

How to Set Target Number of Sections to Offer

Do any of the following:

- To set the Target Number of Sections to Offer for one or more courses based upon the number of course requests and the course maximum enrollment, navigate to **PowerScheduler** > **Functions** > **Calculate Target Number of Sections to Offer** > **Submit**.
- To set the Target Number of Sections to Offer manually for a single course, navigate to **PowerScheduler** > **Courses** > Choose a Course > **Preferences** > Enter the **Target Number of Sections to Offer** > **Submit**.
- To set the Target Number of Sections to Offer to be the same for one or more courses, navigate to **PowerScheduler** > **Functions** > **Auto Fill Course Information** > Enter the **Target Number of Sections to Offer** > **Submit**.
- To set the Target Number of Sections to Offer based upon the current active master schedule, navigate to **PowerScheduler** > **Functions** > **Auto Generate Course Information** > **Select checkbox to verify the command** > **Submit**.

Maximum Enrollment

Set the **Maximum Enrollment** for each course. The Visual Scheduler does not require this information, but it is needed if you want to calculate the Target Sections of Sections to Offer.

Note: There are several methods to set this value.

How to Set Maximum Enrollment

Do any of the following:

- To set the Maximum Enrollment manually for a single course, navigate to **PowerScheduler** > **Courses** > Choose a Course > **Preferences** > Enter the **Maximum Enrollment** > **Submit**.

- To set the Maximum Enrollment to be the same for one or more courses, navigate to **PowerScheduler** > **Functions** > **Auto Fill Course Information** > Enter the **Maximum Enrollment** > **Submit**.
- To set the Maximum Enrollment based upon the current active master schedule, navigate to **PowerScheduler** > **Functions** > **Auto Generate Course Information** > **Select checkbox to verify the command** > **Submit**.

Getting Started

Launch the Visual Scheduler

Use this procedure to launch the Visual Scheduler.

Note: In order to access the Visual Scheduler, you need to have the proper security permissions. For more information, see *Security*.

How to Launch the Visual Scheduler

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Schedule, choose **Visual Scheduler**. The Visual Scheduler page appears. By default, the page loads the current active scenario.

   Note: It may take a moment for the page to display as PowerSchool loads the scenario for the current active scenario.

   Note: If the data to be displayed is large and could take some time to render, a message appears indicating that you may want to filter the schedule. If so, click **Filter** to narrow the master schedule grid to display a specific set of sections based specified criteria or click **Continue** to load the entire schedule.

Working with the Visual Scheduler

The Visual Scheduler consists of the following main areas:

- Toolbar
- Courses Panel
- Master Schedule Grid
- Seats Available Chart

Toolbar

The toolbar appears at the top of the Visual Scheduler and includes the following information:

- Filter Courses
- Sort Courses
- Filter Sections
- Undo/Redo
- Zoom

Filter Courses

You can use the **Courses Filter** to narrow the courses available in the Courses Panel to a specific set of courses based on term and sections remaining to be scheduled.

Note: If the **Courses Filter** icon (Filter by Course) appears blue, no filters are active (or no filters have been applied). If the **Courses Filter** icon (Edit Course) appears green, one or more filters are active (or have been applied). By default, the filter is active (or is applied), and displays only courses with unscheduled sections for all terms.

Note: If you apply a filter, those settings are retained making your personalized filter available each time you navigate back to the Visual Scheduler.

How to Add a Course Filter

1. In the Courses panel, click the blue **Courses Filter** icon. The Courses Filters pop-up appears.
2. Use the following table to enter information as needed:

Field	Description

Terms	To narrow the Courses Panel by term, do one of the following: • Choose the **All** option to view all courses. This is the default setting. • Choose the terms option and then select the terms you to view. Press and hold COMMAND (Mac) or CONTROL (Windows) to make multiple selections. The terms that appear are based on the scenario setup.
Courses	To narrow the Courses Panel based sections remaining to be scheduled, do one of the following: • Choose the **All** option to view both unscheduled (courses with sections remaining to be scheduled) and scheduled (courses with no sections remaining to be scheduled) courses. • Choose the **Unscheduled** option to view only courses with sections remaining to be scheduled. This is the default setting.

3. When you have made your selections, click **Filter**. The Courses Filters pop-up closes and the Courses Panel displays courses based on your selections.

How to Edit a Course Filter

1. In the Courses panel, click the green **Courses Filter** icon. The Courses Filters pop-up appears.
2. Edit information as needed. For field descriptions, see *How to Add a Course Filter*.
3. When you have made your selections, click **Filter**. The Courses Filters pop-up closes and the Courses Panel displays courses based on your selections.

Sort Courses

Using the Sort function, you can sort courses by the course name, course number, department, unscheduled sections (number of sections remaining to be scheduled), or course rank. This provides quick access the courses you want to schedule next.

Note: If the **Courses Sort** icon appears blue, the sort function is using the default settings. If the **Courses Sort** icon appears green, the sort function is using user-defined settings.

Note: If you sort courses, those settings are retained making your personalized sort available each time you navigate back to the Visual Scheduler.

How to Sort Courses

1. In the Courses panel, click the **Courses Sort** icon. The Course Sort Options pop-up appears.
2. Use the following table to edit information as needed:

Field	Description
Sort By	Choose one of the following: • **Course Name** – Sorted by name, then by number. This is the default setting. • **Course Number** – Sorted by number, then by course name. • **Department** – Sorted by department, then by course name. • **Unscheduled Sections** – Sorted by unscheduled sections, then by number of course requests. • **User Defined Rank** – Sorted by user-defined rank, then by course name. **Note:** Courses that do not have a user defined course rank appear below courses that do have user defined course rank. This option only appears if the active scenario is a "build and load" scenario. • **System Defined Rank** – Sorted by system-defined rank, then by course name. **Note:** Courses that do not have a system defined course rank appear below courses that do have a system defined course rank. This option only appears if the active scenario is a "build and load" scenario.
Sort Direction	Choose one of the following:

	• **Ascending** – Sort in ascending order within the selected sort order. • **Descending** – Sort in descending order within the selected sort order.

3. When you have made your selections, click **Sort**. The Course Sort Option pop-up closes and the Courses Panel displays courses based on your selections.

Filter Sections

You can use the **Sections Filter** to narrow the master schedule grid to display a specific set of sections based specified criteria.

Note: If the **Sections Filter** icon appears blue, no filters are active (or no filters have been applied). If the **Sections Filter** icon appears green, one or more filters are active (or have been applied).

Note: If you apply a filter, those settings are retained making your personalized filter available each time you navigate back to the Visual Scheduler.

How to Add a Section Filter

1. On the master schedule grid, click the blue **Sections Filter** icon. The Section Filters pop-up appears.
2. Click the **Add Filter** pop-up menu to choose the criteria by which you want to filter sections by:

Field	Description
Teacher Elements	• Teacher • Teacher Department
Time Elements	• Term • Period • Day
Location Elements	• Room

	• Building
Section Elements	• Course • Grade Level • Team • Section Type • Section Department • House • Subject Area • Credit Type

The Section Filters pop-up displays the options for the selected element.

3. Select the options you want to filter by.

   Note: To select multiple options, press and hold COMMAND (Mac) or CONTROL (Windows) as you click each option. If multiple options are selected, sections will appear for all options selected.

4. Repeat Step 2 and Step 3 for each filter you want to add.

   Note: If multiple filters are selected, each filter added further narrows results. When you have made your selections, click **Filter**. The Section Filters pop-up closes and the master schedule grid displays sections based on your selections.

How to Edit a Section Filter

1. On the master schedule grid, click the green **Sections Filter** icon. The Section Filters pop-up appears.
2. You can do the following:
   - Update an existing filter by making a new selection.
   - Remove a filter by clicking the **x** to the right of the filter.
   - Add a filter. See Step 2 through Step 3 of *How to Add a Section Filter*.
   - Click **Clear Filters** to remove all filters.
3. When you have made your selections, click **Filter**. The Section Filters pop-up closes and the master schedule grid displays sections based on your selections.

How to Reapply a Section Filter

If you alter the master schedule grid after you have used the Sections Filter function, click **Filter** again to reapply the filter.

Undo and Redo

When working with the Visual Scheduler, you may want to undo something you've done. Then again, you may undo an action and then decide you need to redo that action.

Using the **Undo** and **Redo** buttons, the following actions can be modified:

- Moving a Course from the Courses Panel to the Master Schedule Grid
- Editing Section Information
- Deleting a Section From the Master Schedule Grid
- Moving a Section

Note: The **Undo** and **Redo** buttons appear shaded until an action is performed.

Note: Deleting a section from the master schedule grid using the **Undo** button results in all enrollment records associated with the section being permanently deleted. Using the Redo button will recreate the section, but not the enrollment records.

Note: Once you refresh the page or navigate to another page, actions cannot be undone or redone.

Zoom

Using the Zoom icons you can increase the size of the master schedule grid for better readability or decrease the size of the master schedule grid to see a high-level view of the schedule, which provides a quick way of identifying gaps in the schedule.

How to Zoom Out

Click – to zoom out on the master schedule grid.

Note: When zoomed out, the text that appears in the master schedule grid no longer displays. To view section information, hover over a tile and a tooltip appears displaying the section information.

How to Zoom In

Click + to zoom in on the master schedule grid.

Courses Panel

On the left of the master schedule grid, courses in the course catalog associated to this scenario display in the courses panel.

The course name, course number, and department display for each course that is available in the course catalog associated to the scenario.

When all sections of a course are scheduled, the course no longer appears in the courses panel. Alternately, if a section of a course is unscheduled after all sections of the course have been scheduled, the course will once again appear in the courses panel. This is only applicable the courses panel is filtered using the **Unscheduled** option to view only courses with sections remaining to be scheduled. This is the default setting.

Course Information

When hovering over a course in the courses panel, the following information appears in a tooltip:

Note: As you are viewing the tooltip, you may also note that any course section already on the master schedule grid appears highlighted. If an edge of the master schedule grid appears highlighted, it denotes section meetings not within view.

Item	Description
[Course Name]	The course name.
[Course Number]	The course number.
[Seats Made Available by Grade Level]	The numbers that display indicate how many seats will be made available for each grade level for students to be scheduled into when a section of the course is created. These numbers are determined by taking the number of course requests for a given course, by grade level, dividing by the target number of sections to offer, and rounding up if needed.
[Optimal Number of Students]	The number that displays here indicates the ideal balanced classroom size and is determined by taking the total number of primary and elective course requests and dividing by the target number of sections to offer.

[Maximum Enrollments]	The maximum enrollment for the course. **Note:** To modify this setting, navigate to **PowerScheduler > Courses > [Course Name] > Preferences**.
[Unscheduled Sections]	The number of sections that need to be scheduled for the course.
[Scheduled Sections]	The number of sections that have been scheduled for the course.
[Target # of Sections to Offer]	The target number of sections to offer for the course. **Note:** To modify this setting, navigate to **PowerScheduler > Courses > [Course Name] > Preferences**.
[Teacher Assignments]	The teacher assignments that have been created for the course.

Course Alerts

If a course's terms are set up incorrectly, an **Alert** icon (triangle with an exclamation) appears in the upper right corner of the course tile. If an **Alert** icon appears, the course cannot be added to the master schedule grid until valid terms are selected for the course.

Additionally, if the course was added to the master schedule grid prior to the alert, the section tiles that appear on the master schedule grid cannot be modified until the invalid terms are corrected. For more information, see *Section Alerts*.

How to View a Course Alert

Click the **Alert** icon to view the alert. Possible error messages include:

- The course [Course Name] has no terms. To set up valid terms for the course, see *Course Preferences*.
- The course [Course Name] has no valid terms. To set up valid terms for the course, see *Course Preferences*.
- The course [Course Name] has an invalid mix of terms. To set up valid terms for the course, see *Course Preferences*.

How to Correct a Course Alert

Use the following procedure to correct Valid Terms at the course level.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The courses menu appears.
3. Choose **Preferences** from the pop-up menu.
4. Click the name of the course you want to correct. The Course Information page appears.
5. Click **Associate** next to **Valid Terms** to select the terms the course can meet. For example, assume you want the system to schedule a half-year course in the fall of a two-term school year. Select **S1** (first semester) as the only valid term for the course.
6. Click **Submit**. The Changes Recorded page appears.

Course Level Course Requests in Common

You can use the Course Requests in Common pop-up to view which courses have requests in common. Course requests in common represent potential conflicts.

How to Use the Course Requests in Common Function

1. Click the **Show Course Requests in Common** (grid) icon. The Course Requests in Common pop-up appears.
    - The total number of course requests for the selected course appears after the course name and number.
    - Singleton (square with one dot) courses that share requests in common appear at the top of the list.
    - Doubleton (square with two dots) courses that share requests in common appear next.
    - The name and number of each course appears, as well as the total number of course requests in common for each course listed.
    - Courses are sorted in descending order based on the total number of course requests.
    - If there are no commonalities, the message “No Course Requests in Common” appears.
2. To view courses with multiple sections that share requests in common, click **Show All Courses with Requests in Common**.

   Note: If there are no singletons and doubletons that share requests in common, this link does not appear, as the courses with multiple sections that share requests in common will automatically appear in the pop-up. Additionally, if there are no courses with multiple sections that share requests in common, this link does not appear.

3. Click the upper right corner to close.

Create Sections

Create your schedule quickly and easily by dragging and dropping course tiles to create sections for each course in your course catalog.

Note: When creating a section, note the following:

Item	**Description**
Multiple Section Meetings	If a course section has multiple meetings (more than one period per meeting or meets on multiple days), as you drag the course onto the master schedule grid, you will note that multiple cells appear orange.
Orange	When placing a course on the master schedule grid, the course may be placed in any cell that appears orange. If a course is placed in a cell that is not orange, the course will revert back to the courses panel. A cell that does not appear orange indicates the cell doesn't match the course's valid start periods or valid terms, or isn't in one of the days, which the valid day combinations for the course are defined.
Preferred Room	The section is automatically assigned to the teacher's preferred room if one has been defined. If the teacher's preferred room has not been defined no room is automatically assigned. You can change the room associated to the section. For more information, see *How to Edit Section Information*. **Note:** For more information defining a teacher's preferred room, see *How to Edit Staff Schedule Setup*.
Scrolling	When placing a course on the master schedule grid, the master schedule grid scrolls to the left, right, top or bottom of the schedule grid while dragging the course tile without having to click.

Striping	If a tile appears shaded with striping, it denotes that a Teacher Free constraint has been specified for that period, day, and/or term. However, you may still schedule a course in that cell, but may need to remove the teacher constraint. To modify this setting, navigate to **PowerScheduler > Constraints > Teacher Free**.

How to Create a Section

To create a section, move a course tile from the courses panel to the master schedule grid, by dragging and dropping the course tile to the preferred teacher/day/period cell. This creates a section of the course. If more than one period per meeting has been defined for a course, multiple meetings of that course section will be created.

Master Schedule Grid

The master schedule grid is organized with departments, teachers, and days across the top, periods down the left, and sections within the interior rows and columns.

Departments

In the first header row, the name of each teacher department displays in alphabetically ascending order.

"Department Not Specified" appears at the end of the row to group teachers who are not associated to a specific department.

Teachers

In the second header row, teachers appear grouped by department.

Within each department, teachers appear in alphabetically ascending order by last name.

Teachers who are not associated to a department appear grouped together in alphabetically ascending order under the heading of "Department Not Specified" at the end of [Departments] row.

For each teacher, his or her last name and first name appear.

If a teacher’s name is longer than the width of the cell, an ellipsis appears. To view’s a teacher’s entire name, hover over the cell and a tooltip appears displaying the teacher’s last name, first name, middle initial, teacher number, and teacher ID.

Note: Only teachers who are active (see the Select A Staff Member page) and have the **Schedule This Teacher** checkbox selected on the Staff Scheduling Preferences page appear.

Days

If the scenario contains more than one cycle day, the days appear in the third header row.

Note: Days are sorted by **ID**. However, the **Abbreviation** is the text that appears in the heading. For more information, see *Edit Days*.

Periods

In the first column, the abbreviation of each period displays by period sort order.

Sections

Sections for each teacher appear within the interior rows and columns, including:

Item	Description
[Course Name]	The course name. **Note:** If the course name is longer than the width of the tile, an ellipsis appears. To view's the course name in its entirety, hover over the tile and a tooltip appears displaying the full course name.
[Course Number.Section Number]	The course and course section number. **Note:** If the course and course section number are longer than the width of the tile, an ellipsis appears. To view the course and course section number in its entirety, hover over the tile and a tooltip appears displaying the course and course section number.
[Singleton/Doubleton Indicator]	A square with one dot indicates a singleton and a square with two dots indicates a doubleton. In addition, singleton tiles appear pink and doubleton tiles appear green. **Note:** A singleton is a course with only one section in a given school year. A doubleton is a course with two sections in a given

	school year. This is determined by the value in the target number of sections to offer. **Note:** To modify this setting, navigate to **PowerScheduler > Courses > [Course Name] > Preferences**.

Section Information

When hovering over a course section in the master schedule grid, the course section expands for better readability. Additionally, a tooltip displays the following information:

Note: If there is more than one section meeting for the selected course section, the course section and all section meetings appear highlighted. If an edge of the master schedule grid appears highlighted, it denotes additional section meetings not within view.

Item	Description
[Course Name]	The course name.
[Course Number]	The course number.
[Section Number]	The course section number.
[Seats Made Available by Grade Level]	The numbers that display indicate how many seats will be made available for each grade level for students to be scheduled into when a section of the course is created. These numbers are determined by taking the number of course requests for a given course, by grade level, dividing by the target number of sections to offer, and rounding up if needed.
[Optimal Number of Students]	The number that displays here indicates the ideal balanced classroom size and is determined by taking the total number of primary and elective course requests and dividing by the target number of sections to offer.
[Maximum Enrollments]	The maximum enrollment for the course. **Note:** To modify this setting, navigate to **PowerScheduler > Courses > [Course Name] > Preferences**.

[Unscheduled Sections]	The number of sections that need to be scheduled for the course.
[Scheduled Sections]	The number of sections that have been scheduled for the course.
[Target # of Sections to Offer]	The target number of sections to offer for the course. **Note:** To modify this setting, navigate to **PowerScheduler > Courses > [Course Name] > Preferences**.
[Teacher Assignments]	The teacher assignments that have been created for the course.

Term Length

The term length of the course is reflected in the appearance of the section tile within a cell:

Note: A term length may be defined up to a twelfths-length course.

- If the course is a yearlong course, the section tile takes up the entire cell.
- If the course is a semester-length course, the cell is divided into two segments. The section tile appears within the cell based on when the section occurs (S1 or S2).
- If the course is a trimester-length course, the cell is divided into three segments. The section tile appears within the cell based on when the section occurs (T1, T2, or T3).
- If the course is a quarter-length course, the cell is divided into four segments. The section tile appears within the cell based on when the section occurs (Q1, Q2, Q3, or Q4).

How to Edit Section Information

1. Click the section tile you want to edit. The Section Detail pop-up appears.
2. Use the following table to enter information in the fields:

Field	Description
Course name	The name and number of the selected course appears. **Note:** This field is read-only.

Section number	The section number for the section appears. **Note:** This field is read-only.
Current Enrollment	The current enrollment of students in the section appears. Click to view the section's class roster. The Class Roster page appears. For more information, see *Class Roster*. If no students are enrolled, a zero displays. **Note:** You can also access the Class Roster page from the master schedule grid. Simply press and hold COMMAND (Mac) or CONTROL (Windows) and click the section tile. **Note:** For more information about enrolling students, see *Schedule This Student*. **Note:** For more information about using the scheduling engine to load students into the master schedule, see *Load Process: Load Students*.
Maximum Enrollment	Enter the maximum number of students that can enroll in the section. If nothing is entered, a zero displays and the maximum enrollment is the same value as set for the course.
Expression	Select the checkboxes for the periods and for the days on which the section is taught. **Note:** This creates the schedule expression that appears next to the section on several pages.
Term	From the pop-up menu, choose the term in which the section is offered. Only valid terms as set for the course display.
Room	From the pop-up menu, choose the room in which the section is taught.
Grade Level	Enter the grade level of the section.
Teacher	From the pop-up menu, choose a teacher.

Close Section at Max	Select the checkbox to not accept more enrollments than the maximum number of enrolled students.
Lock Section	Select the checkbox if the section should not be rescheduled during the next build.
Section Type	From the pop-up menu, choose the type of section, such as Bilingual.
House	From the pop-up menu, choose the house to which the section belongs.
Team	From the pop-up menu, choose the team associated with the section.
School Where Taught	Enter the school ID if the section is taught at a different school.
Dependent Sections	Enter any dependent sections for the section. Separate multiple sections with commas.
Grade Scale	From the pop-up menu, choose the grade scale for the section.
Maximum Load Status	From the pop-up menu, choose whether the section should be exempt from counting towards a teacher's maximum student load • **Exempt**: Students enrolled in the section do not count towards a teacher's maximum student load. • **Lab**: Includes the students enrolled in the section in the calculated average of the number of students scheduled into all lab sections assigned to a teacher. This average is then applied to the teacher's maximum student load. • **Non-Exempt:** Students enrolled in the section count towards a teacher's maximum student load.

Exclude From Attendance	Select the checkbox if you do not want to include the section in the student ADM/ADA counts.
Exclude from GPA?	Select the option to either include or exclude the grade from the GPA calculation.
Exclude from Class Rank?	Select the option to either include or exclude the grade from the class rank calculation.
Exclude from Honor Roll?	Select the option to either include or exclude the grade from the honor roll calculation.

3. Click **Save**. The Section Detail pop-up closes. If the term, teacher, period, and/or day were changed, the section will appear in a new location on the master schedule grid as specified.

How to Delete a Section

Note: Deleting a section from the master schedule grid results in all enrollment records associated with the section being permanently deleted.

1. Click the **Course Name** of the section you want to delete. The Section Detail pop-up appears.
2. Click **Delete**. A deletion confirmation notice appears.
3. Click **Delete**. The section is deleted.

Section Alerts

If a section's terms, number of periods per meeting, valid day combinations, and/or valid start periods are set up incorrectly, an **Alert** icon (triangle with an exclamation) appears in the upper right corner of the section tile. If an **Alert** icon appears, the section tile cannot be moved until the setup is corrected.

How to View a Section Alert

Click the **Alert** icon to view the alert. Possible error messages include:

- This section does not match valid terms.
- This section does not match [number of periods per meeting] periods per meeting.

- This section does not match valid days [day combinations].
- This section does not match valid start periods [periods].

How to Correct a Section Alert at the Section Level

Use the following procedure to correct at the section level.

1. Click the section tile you want to correct. The Section Detail pop-up appears.
2. Use the following table to edit information as needed:

Field	Description
Expression	Select the checkboxes for the periods for the appropriate days on which the section is taught. **Note:** This creates the schedule expression that appears next to the section on several pages.
Term	Choose the term in which the section is offered from the pop-up menu. Only valid terms as set for the course display. **Note:** If valid terms set for the course differ from the terms associated to the active scenario, adjust the terms associated to the scenario or the valid terms set for the course.

3. Click **Done**. The Section Detail pop-up closes. If the term, teacher, period, and/or day were changed, the section will appear in a new location on the master schedule grid as specified.

How to Correct a Section Alert at the Course Level

Use the following procedure to correct the Periods Per Meeting, Valid Start Periods, Valid Terms, and/or Valid Day Combinations at the course level.

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Resources, choose **Courses** from the PowerScheduler menu. The courses menu appears.
3. Choose **Preferences** from the pop-up menu.
4. Click the name of the course you want to correct. The Course Information page appears.

5. Use the following table to edit information as needed:

Field	Description
Periods Per Meeting	Enter the number of periods the course section meets each time it convenes. Most courses meet for a single period. Some courses have an intensive curriculum and may convene for two or more periods per meeting.
Valid Start Periods	Select the checkbox next to the appropriate periods to determine in which periods the course is valid to start. For example, if you want a course that has two periods per meeting to start any period except 6 or 7 in a seven-period day, select the checkboxes next to Period 1, Period 2, Period 3, Period 4, and Period 5.
Valid Terms	Click **Associate** to select the terms the course can meet. For example, assume you want the system to schedule a half-year course in the fall of a four-term school year. Select **S1** (first semester) as the only valid term for the course. **Note:** Only terms that are active for the scenario are available for selection. For example, if your scenario has yearlong and quarter-long terms, then S1 would not be available for selection.
Valid Day Combinations	Enter the valid days that the course can meet. For example, if a teacher is available to teach a course only on the B day of an AB schedule, enter **B**. Click **Day** to add or edit a day. Enclose single entries in parentheses, such as (B). Enclose multiple entries each in its own parenthesis and join together, such as (A)(B)(D). Use commas to indicate day combinations and/or dashes to indicate a range, such as (A,C-E).

6. Click **Submit**. The Changes Recorded page appears.

Section Level Course Requests in Common

You can use the Course Requests in Common pop-up to view which sections have requests in common within the selected period, day, and term, including any terms that overlap, such as Trimester 1 and Quarter 1. Course requests in common represent potential conflicts.

How to Use the Course Requests in Common Function

1. Click the **Show Course Requests in Common** (grid) icon. The Course Requests in Common pop-up appears.
    - The total number of course requests for the selected course appears after the course name and number.
    - Singleton (square with one dot) courses that share requests in common appear at the top of the list.
    - Doubleton (square with two dots) courses that share requests in common appear next.
    - The name and number of each course appears, as well as the total number of course requests in common for each course listed.
    - Courses are sorted in descending order based on the total number of course requests.
    - If there are no commonalities, the message "No Course Requests in Common" appears.
2. To view courses with multiple sections that share requests in common, click **Show All Courses with Requests in Common**.

    Note: If there are no singletons and doubletons that share requests in common, this link does not appear, as the courses with multiple sections that share requests in common will automatically appear in the pop-up. Additionally, if there are no courses with multiple sections that share requests in common, this link does not appear.

3. Click the upper right corner to close.

Move Sections

Sections may be moved from one cell to another by dragging and dropping. Additionally, a section may be moved by editing the section information via the Section Detail pop-up. For more information, see *How to Edit Section Information*.

Note: When moving a section, note the following:

Item	Description

Multiple Section Meetings	If a course section has multiple meetings (more than one period per meeting or meets on multiple days), as you move a section, you will note that multiple cells appear orange.
Multiple Sections	Multiple sections can be scheduled within the same teacher/period/day/term cell so that you can create a schedule that best meets your school's scheduling and reporting needs. If a teacher/period/day/term cell becomes exceedingly complex, the section tile displays the message “Too complex to display. Sections: [Number of Sections scheduled into this cell appears]”. Click to view the Scheduled Sections Too Complex to Display pop-up, which provides information about how to view the sections and the sections scheduled for this teacher/period/day/term.
Orange	When moving a section in the master schedule grid, the section may be placed in any cell that appears orange. If a section is placed in a cell that is not orange, the section will revert back to its original position. A cell that does not appear orange indicates the cell doesn’t match the section’s or the course’s criteria.
Preferred Room	The section is automatically assigned to the teacher's preferred room if one has been defined. If the teacher’s preferred room has not been defined, no room is automatically assigned. You can change the room associated to the section. For more information, see *How to Edit Section Information*. **Note:** For more information defining a teacher’s preferred room, see *How to Edit Staff Schedule Setup*.
Scrolling	When moving a section in the master schedule grid, the master schedule grid scrolls to the left, right, top or bottom of the schedule grid while dragging the section tile without having to click.
Striping	If a tile appears shaded with striping, it denotes that a Teacher Free constraint has been specified for that period. However, you may still schedule a section in that cell, but may need to remove

	the teacher constraint. To modify this setting, navigate to **PowerScheduler > Constraints > Teacher Free**.

How to Move a Section

Do any of the following:

- To move a section from one teacher to another, drag and drop the tile from one cell to the other.
- To move a section from one period to another, drag and drop the tile from one cell to the other.
- To move a section from one day to another, drag and drop the tile from one cell to the other. This is only applicable if the scenario contains more than one cycle day in the schedule.
- To move a section from one term to another, drag and drop the tile from one cell to the other. This is only applicable if the scenario contains more than one term in the schedule and the valid terms for the course contains more than one term.

Print the Master Schedule Grid

Using the Printer icon, you can print a printer-friendly version of the master schedule grid.

Note: Print sizing and margin's implementation differ across browsers; you may need to adjust these values to get the best results.

How to Print the Master Schedule Grid

1. Click the Printer icon. The Print Setup pop-up appears.
2. Use the following table to enter information:

   Note: Page setup options must match your print page setup. Background printing must be enabled to print in color.

Field	Description
Pages	Choose one of the following options: • **Single Page** – Print the master schedule grid on large/long sheet of paper.

	• **Multiple Pages** – Print the master schedule grid on several sheets of paper.
Paper Size & Margins	Enter the size of the paper: • **Width** • **Height** • **Unit** Enter the size of the margins: • **Top** • **Left** • **Bottom** • **Right**
Color	Choose one of the following options: • **Black & White** • **Color**
Header Font Size	This is the size of the letters. It is set in points (72 points = 1 inch). Enter the font size you want the header to appear as.
Body Font Size	This is the size of the letters. It is set in points (72 points = 1 inch). Enter the font size you want the contents to appear as.
Fill Entire Page	Select this option to fit entire printable area on a page. Otherwise, leave blank.
Teachers Per Page (#) Teachers Total	If **Multiple Pages** has been selected, enter the number of teachers you want to appear on each page. The total number of teachers that appears is based on the **Schedule** option you select below. Use this number to help you determine how many teachers you want to appear on each page.

Schedule	Choose one of the following options: • **All Sections** – Print all sections of the master schedule grid. • **Filtered Sections** – Print a specific set of sections of the master schedule grid. Sections that appear are based on the applied Sections Filter. For more information, see *Sections Filter*.

3. Click **Preview & Print**. Preview and print the master schedule grid.

   Note: Options vary based on your operating system and browser settings.

Seats Available Chart

The seats available chart overlays the schedule and auto calculates the number of seats that have been made available for each grade level for each period in the schedule. The seats available chart is updated as information changes in the master schedule grid.

How to Show the Seats Available Chart

By default, the Seats Available Chart appears hidden. To show, click the **Show Seats Available Chart** arrow to the right of the master schedule grid.

How to View the Seats Available Chart

Once the Seats Available Chart loads, the following information appears:

- The name of each grade and the number of students enrolled in the grade
- The days (if the scenario contains multiple days)
- The sum of total seats that is available to satisfy the course requests per period, per day (if multiple-day scenario) and per term.

Note: When terms overlap within a given day, period, and grade level, seats available are tallied and displayed by term. Terms are determined to be overlapping when the term segments will not evenly divide the term with the maximum number of segments.

How to Hide the Seats Available Chart

To hide, click again (now the **Hide Seats Available** arrow).

Next Steps

When you have a satisfactory schedule and want to make it your master schedule for the next school year, you must commit it. Once a schedule is committed, it replaces any existing master schedule and becomes your current schedule.

When to Commit the Master Schedule

When your master schedule is as good as it can possibly be and school is no longer in session, commit the master schedule. When you commit a master schedule, it replaces any existing master schedule for that school year.

To ensure that attendance is set up properly, your "live side" school year should be created before committing your schedule in PowerScheduler. Also, when committing a master schedule, course information, including credit hours, is retrieved from the district level in PowerSchool.

Note: If you use PowerScheduler to create a master schedule, you should commit your master schedule before running the End-of-Year Process. The End-of-Year process modifies each student's Next School Indicator and Next Year Grade. If PowerScheduler is used after running the End-of-Year process, it is possible that students will be scheduled for the wrong school or grade level.

How to Commit the Master Schedule

1. On the start page, choose **PowerScheduler** under Applications in the main menu. The Scheduling page appears.
2. Under Processing, choose **Commit**. The Commit Master Schedule page appears.
3. Select which schedules to copy:
    - **Sections Only**: Select this option to commit only sections.
    - **Student Schedules Only**: Select this option to commit only student schedules.
    - **Sections & Student Schedules**: Select this option to commit both sections and student schedules.
4. Click **Submit**. The Verify Commit Master Schedule page appears.
5. If you are certain that you want to commit, click **Submit**. The Changes Recorded page appears.