PowerSchool | Customer Education

PowerSchool Special Programs: Administration Part 2

In this session, learn how to assign security and set up documents, keyword tables, public statements and more to ensure staff have access to what they need in PowerSchool Special Programs to process documentation with ease.

In this course, you will learn about:

- Snippets
- Managing staff security
- Using system administrator access
- Managing editable keyword tables
- Document and section template behaviors

Getting Started

In PowerSchool Special Programs: Administration Part 1, you learned about My Home Page, navigation, profiles, documents, and more. Now briefly review some of these concepts.

My Home Page

My Home Page is your Special Programs dashboard. In the header, the PowerSchool Special Programs logo is a link to My Home Page. Whenever you see this icon, click it to return to My Home Page. Being able to return to My Home Page from almost anywhere in Special Programs comes in handy when you want to start a new task.

Also contained within the header section is the Special Programs Help menu. Click the question mark icon to access the Help menu. Next to the question mark icon is an icon with the current user initials. Click this icon to access a menu of user-related options, including the sign out link. Always sign out of Special Programs when you leave your workstation or are done using the program.

The specific options and panels you have in My Home Page are determined by the security group assigned to your user account and the permissions granted to the security group. Once you leave My Home Page for another page, the page names appear in the navigation toolbar. These linked page names are called the navigation path, or breadcrumbs. Click a link in the navigation path to return to that page.

For this class, your user account is part of the Administrators security group, which has all of the available permissions for full access that a district or province administrator might typically have. Only a system administrator would typically have additional permissions. It is recommended that district or province administrators use their administrator account to perform day-to-day activities and refrain from using their system administrator account except when necessary.

For this class, your trainer will demonstrate some activities that require system administrator access and cannot be done by more than one administrator at a time since everyone in the class is working on the same server.

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Top Navigation Menus

Across the top of Special Programs, you will see several menus to access different features in Special Programs. The areas that are most useful to administrators are listed below:

- Search: Students, Classes, Districts, Locations, Staff, General Ed Students
- Communication: Send Messages, Messages, Announcements, Discussions
- Reporting: Standard Reports
- Administration: Utilities, Security, Configuration, Assume System Admin Role
- Question mark icon: Admin Help

Activity 1 – Access Special Programs

Sign in and navigate to Special Programs, then take a look around.

1. Sign in using the server and sign-in credentials provided by your trainer
2. Navigate to Special Programs

   Special Programs My Home Page opens in a new browser tab.
3. Briefly explore My Home Page and the top navigation menus
4. Click the PowerSchool Special Programs logo at the top-left corner to return to the My Home Page

Security Management

Through the different levels of security access, between ADMIN and System Administrator, determine who can see and edit different portions of the platform.

Security Group and Document Template Permissions

Security groups are created to control the different functionalities each user has. Users are classified in security groups based on the role they have within their district. Security groups ensure that users are only granted the permissions they need to provide the necessary services to students.

Within each Security Group, users are granted or denied access to features as well as granted view, edit, or no rights to different document templates. The features essentially allow user groups to have permission to view, edit, or not see at all the different functionalities of the entire platform and individual documents.

Security groups are aligned to PowerSchool SIS classifications. By aligning the security group to a SIS classification, membership to security groups is managed through nightly communication however, updates can be made manually if needed.

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Activity 2 – Access Security Groups and Document Template Permissions

Locate the pre-existing security groups and monitor the permission levels they have. Evaluate the levels of permission for each user within the platform and the documents. Identify if those needs meet the requirements of your district.

1. From the toolbar, click the Administration menu and select Security
2. By clicking on the name of each group open up each groups security profile
3. By using the tabs at the top, view the functions each group has been granted, the members who make up the group, and Document Templates to see the permission level granted for each type of document

**With your district team, go through each security group and identify the functionalities they have been granted and denied. Determine if this grouping works for your district or if your district will need to make adjustments.

Copying Security Groups

If a new Security Group is needed, but only slight modifications are needed from what already exists, Copying the Security Group is a more efficient approach.

Activity 3 – Copy an Existing Security Group and Make Alterations (Trainer Demo)

Navigate to Security in Special Programs and watch your trainer demonstrate copying a security group and making changes. Determine which groups need to be copied and slight changes made for efficiency in your district.

1. From the top navigation menu, click **Administration** then **Security**
2. From the list of security groups, select **CustomerEd Training**
3. From the More menu select New Security Group (using privileges below)
4. Fill in the Name
5. Select the Training Category
6. Point out PS SIS User Access Role option and Messaging ID option
7. Discuss differences between system-wide and location-wide administrators

   **System-Wide Security Administrators includes individuals who have access to all profiles in the district, Location-Wide Security Administrators includes individuals who have access to all profiles ONLY at building level

8. Check the box next to Copy Document Template Rights from Original Security Group to copy over Document Security settings
9. Make adjustments to granted and denied privileges to meet the needs of your district
10. Click Accept and return to the My Home Page

   **Based on the decisions you made in the previous activity; discuss with your team, what security groups will you need to make copies of, and what minor changes do you want to make to those groups?

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Creating New Security Groups and Setting Permissions

When a new security group needs to be formed the ADMIN user is the only user with clearance to do so. By opting to make a new Security Group the ADMIN user will need to build all new security permissions and define the users to include in the group.

Activity 4 – Create a New Security Group (Trainer Demo)

Navigate to Security in Special Programs and watch your trainer demonstrate creating a new security group and setting permissions. Determine if what groups need to be built to accommodate your district's workflow.

1. From the top navigation menu, click **Administration** then **Security**
2. From the top menu, select New Security Group
3. Fill in the Name
4. Select the Training Category
5. Point out PS SIS User Access Role option and Messaging ID option
6. Discuss differences between system-wide and location-wide administrators

**System-Wide Security Administrators includes individuals who have access to all profiles in the district, Location-Wide Security Administrators includes individuals who have access to all profiles ONLY at building level

7. Work your way through each level of access and determine what functions need to be granted and denied
8. Click Accept
9. Return to My Home Page

**Based on your decisions during the first break-out session, what security groups will you need to make from scratch in order to accommodate the workflow in your district? Determine what individuals will be in those security groups and what levels of functionality they will need.

Adding Staff Members

Sometimes staff members will need to be part of multiple security groups even though they do not meet the qualifications determined by the PowerSchool SIS integration. ADMIN and System Administrators have the ability to manually add users to other security groups.

Activity 5 – Add a Staff Member to a Security Group (Trainer Demo)

Navigate to Security in Special Programs and watch your trainer demonstrate security management functions. Determine which individuals your district will need to add to different Security Groups because their PowerSchool SIS connection will not give them all the access they need.

10. From the top navigation menu, click **Administration** then **Security**

11. From the list of security groups, select **CustomerEd**

Watch your trainer perform the rest of the activity since everyone in the class is working on the same server. When working on your own server:

12. By default, Properties and Permissions will show indicating the permissions set for that group of members
13. Click **Document Templates** to view the permissions for any document templates the Speech group can access, such as create, edit, or change status.
14. Click **Members** and notice there are no members in this group
15. To add staff to the Staff security group, click **Add members**
16. In the Quick Search, enter the Staff ID of the staff you were assigned

    The Staff ID is the five-digit number for your user account listed in your credentials.
17. Check your assigned staff name and click **Add Staff Marked Below To 'CustomerEd'**
18. Click **CustomerEd > Members** and locate your staff
19. Return to My Home Page

**Determine which individuals from your district will need to be added manually to other groups because of their job requirements.

Filtering Members by Permissions

If the ADMIN user wants to see who can perform certain tasks, they have the ability to search for users based on privileges. By selecting specific actions, the system will filter and produce all security groups with access to that function.

Profile Security

This determines what portions of profiles different security groups have access to see. For example, if a district determines that an ELL teacher does not need to see each students Special Education profile page, they reserve the right to turn off that portion of the student profile for ELL teachers.

Activity 6 – Altering Profile Security (Trainer Demo)

Navigate to Security in Special Programs and watch your trainer demonstrate altering the security to each profile section for individual Security Groups. Determine which security groups need access to each section of the Student Profile.

1. From the top navigation menu, click **Administration** then **Configuration**
2. From the top menu, select Profile Types
3. Click the magnifying glass next to the Student Profile Type

4. From the Edit Section drop-down select Security
5. By using the check boxes, determine which security groups need access to each section of the student profile. Once a selection is made, click Accept.
6. Use the fly-out menu to the left to navigate to the next section of the student profile. Repeat steps 4-5 for each section.

**By going through each page of a student profile, with your district team determine who needs access to which sections in the student profile.

Document and Section Template Behaviors

System administrators and directors have the flexibility to set up documents based on their business processes. The system is set with default behaviors, but the defaults may not best meet the needs of a district or school. Additionally, there are some individual section behaviors that can be modified by the system administrator. Below are some of the document template behaviors as well as the section behaviors (not inclusive). Each model can have unique behaviors as well.

Document Template Behaviors

- Require Previous Document to be Finalized Before New One Created - Users will be prevented from creating a new document if a non-final document from the same template already exists.
- Allow Manual Copying from Other Documents from This Same Template – When users are working on a document using this template, they can manually copy information from previous documents (for the same student) that were made using this same template.
- Allow Manual Copying from Other Documents from Other Templates – When users are working on a document using this template, they can manually copy information from previous documents (for the same student) that were made from other templates as long as the document field has the identical field name.
- Allow Manual Copying from Other Documents from Other Profiles -Users with classes or caseloads will be able to copy document content from other documents from another student, as long as those documents are from the same template.
- Automatically Update Documents from Profile without Prompting - PowerSchool Special Education will always update a non-final document from the corresponding profile, such as data flow, when the document is opened and there will be no end-user prompt or message.
- Do Not Prompt User to Update Documents from Profiles - This option has no impact if the previous option is set. Otherwise, enabling this option stops PowerSchool Special Education from automatically checking for data flow updates from the profile and prompting the user. Users can still manually initiate updating.
- Allow Statement Banks by Organizational Location - Statements banks can be created and maintained for specific organizational locations, such as locations or districts. At the current time, only the outer organizational level is supported. Larger school districts will typically benefit from this option. In smaller school districts, the outer organizational level is typically "locations”.

- Disable Private Statements in This Template - If this option is enabled, end users will not be able to create personal statements for long text fields using this template.
- Enable Comparison with Previous Documents - End users will have an option to compare a document of this template with a previous document of this template and see specifically what has changed or is different between the two documents.
- Allow File Attachments - End users will be able to upload and attach files to documents from this template as long as the document security also allows uploading attached files.
- Use Document setup for New Documents - When users create a new document of this template, they will be presented with a screen that enables them to choose which sections they want to include in the document. If this is disabled, the default sections are automatically included.
- Print Draft/Review Status in Page Header - Non-final documents will print with either "draft" or "review" in the page header.
- Print Draft/Review Status as Water Mark - Non-final documents will print with either a "draft" or "review" water mark.
- Allow Generate Draft Documents as PDF - Users can generate a PDF document from the print view of a draft document.
- Allow Generate Review Documents as PDF - Users can generate a PDF document from the print view of a review document.
- Allow Generate Final Documents as PDF - Users can generate a PDF document from the print view of a final document.
- Require Document Labels to Include Preset Label - End users can minimally use one of the preset labels in the document label/comment dropdown but with the option of embellishing it with additional text.
- Exclude From Transfer Envelopes - This document template will be excluded from any student transfer envelopes sent to other school districts.
- Include Live Documents In Transfer Envelopes - Data to support live documents will be included in student transfer envelopes sent to other school districts. Live documents will be included in student transfer envelopes sent to other school districts.

Document Section Template Behaviors

- Include by Default in New Documents - The section is included by default in new documents.
- Prevent Removal From Document - Useful if the section is absolutely required in every document.
- Require This Section in Final Document - A document cannot be finalized unless it includes this section.
- Prevent Copying From This Section - Useful if you want to make sure that a user cannot copy information from this document into a new document. This only affects manual copying by users and does not affect a "revision" document that utilizes the document revision functionality of PowerSchool Special Education.

- Preset as Completed in New Documents - There will be no requirement for any users to complete the section before the document is finalized.
- Prevent End-User from Force-Completing This Section - The document cannot be finalized unless the section is fully completed (required fields and compliance checks). If the option is not enabled, the user will receive a warning that the section is not complete.
- Require Completion Before Review - Require this section to be completed before the status of the document can be changed to review.
- Suppress Page Break Before This Section - Suppresses the page break that normally appears before this section.
- Prevent Printing This Section - The section will not print through normal printing mechanisms. This does not prevent other extraordinary measures to print the information such as printing a screen shot.
- Set Incomplete in New Revision Document - This option only appears if the document supports revision documents. If set, this section is marked as incomplete when a revision document is created (requiring the user to explicitly complete it).
- Always Omit When Generating PDF - This causes the section to always be omitted when generating documents as PDFs.

Activity 7 – View Document and Section Template Behavior Options (Trainer Demo)

Watch your trainer demonstrate how to edit template behaviors as a system administrator. Look through 4 commonly used templates and determine what changes, if any, need to be made to the determined behaviors of the document or the sections.

7. From the top navigation men, go to **Administration** > **Configuration**
8. Select the Document Templates tab
9. Under IEP Process, click the magnifying glass icon for Individualized Education Program to review steps to override behavior
10. From the Setup options at the top of the page, click **Properties**
11. At the top of the Template Properties page, click **Edit Template Behavior Options**

    On the Edit window that appears, view the Default column that indicates whether or not the behavior option is on by default. To override the default, in the Override Default column, check the box for the option setting you wish to override, and then use the menu to choose On or Off.
12. At the bottom of the list, click **Cancel** since this is a demo activity
13. In the breadcrumbs, click the document name
14. Open the section menu at the top and select the IEP Team Meeting Participants section
15. Select the Section Properties tab
16. Select **Edit Section Behavior Options**

17. You would follow the same steps for section behaviors as for document behaviors by using the check boxes and On/Off menus in the Override Default column
18. Click **Cancel** to close the Edit window
19. Return to My Home Page

**With your team, preview 4 Document templates that will be used regularly in your district. Look at the behaviors of each section and discuss if changes need to be made based on best practice in your district.

Managing Editable Keyword Tables

Use the Keyword Tables feature to access the tables that store the entries available in drop-down menus in profiles and document templates. A keyword table provide users a list of values to select for a certain field. System administrators can customize editable keyword tables as needed. Not all keyword tables are editable by the system administrator, but many can be either partially or fully edited by the system administrator. Keyword tables or keywords used for compliance are configured for a state or province model and cannot be edited by system administrators. Some keyword tables have an option to mark them as In Use or take them out of use without deleting the keyword. This is especially helpful when an option becomes no longer used but some documents already have that option selected. When administrators modify a keyword table and save their changes, users will instantly see the modified data the next time they use the drop-down menu for the associated field.

When using the Keyword Tables feature, system administrators see:

- Each keyword table listed by name with a brief description of the information stored in the table
- The field(s) where each table is used, when applicable

Activity 8 – Modify a Keyword Table (Trainer Demo)

Watch your trainer demonstrate how to modify keyword tables as a system administrator.

20. Sign in as the system administrator and go to **Administration** > **Configuration**
21. On the Configuration page, select the Keyword Tables tab
22. At the top of the page, click **All Tables**

    By default, the list appears filtered for the keyword tables that start with the letter A.

23. To see the list of all keyword tables, at the end of the alpha character navigation menu at the top of the list, select **All**
24. To filter the list for only keyword tables you can edit, click **Editable Tables** then from the alpha character menu, select **All**

    This is the list of keyword tables a system administrator can edit for this model.

25. From the alpha menu at the top, click **C** and click the magnifying glass icon for the Curriculum keyword table

26. Click **Edit Table**

    At the beginning of a keyword row:

    Use the Insert keyword icon that looks like a square with an arrow to insert a new keyword.

    Use the pencil icon to edit the keyword.

    Use the X to delete the keyword.

    **Notice there are no grayed out areas in this keyword table – this means all aspects of the Keyword table can be edited by the ADMIN user.

27. To return to the list of keyword tables, use the breadcrumbs and click **Keyword Tables**
28. From the alpha menu at the top, click **E** and click the magnifying glass for Exceptionalities

    **The keyword names are grayed out, indicating that this keyword table is at least partially managed by the PowerSchool team for regulatory compliance. This means the grayed out information cannot be edited by the ADMIN user.

29. Return to My Home Page

Snippets

There are times when districts want to add fields to certain documents. System administrators have the flexibility to add a field at the top and/or at the bottom of a document. The field can also be added to a report to track the information as well.

Activity 9 – Use the Snippets Feature to Customize a Document Template (Trainer Demo)

Watch your trainer demonstrate how to use the Snippet feature to customize a document template. You must be a system administrator to use the snippets feature.

1. From the top navigation menu, click **Administration** then **Configuration**
2. Choose the Document Templates tab
3. Under the RTI category, click the magnifying glass next to Parent Letter for Intervention (Entrance)
4. Open the More menu and click **Add a New Snippet**
5. Enter **`What is your first day back to school?`** followed by the field name in curly brackets **`{Back2School_}`**

    Curly brackets indicate a data field.

6. Click **Save Done Editing**

   As indicated, the new field is not deployed yet but you can view it to verify it is showing as you anticipated.

7. Click **Edit Snippet**
8. Select the position of the text as **Beginning of the Section**
9. Check **Deployed**
10. Click **Save, Done Editing**

Key Points

- Getting started – Navigate around Special Programs
- Data dictionaries, integrations, and data flows – Use data dictionaries and Data Flow Reports to help you understand fields and data flow in profiles and documents
- Statement banks – Manage statement banks for users to select one or more statements to populate fields configured to use statement banks
- Managing staff security – Use the Assume System ADMIN role to switch from your administrator access to your system administrator access
- Managing editable keyword tables – System administrators can edit certain keyword tables
- Document and section template behaviors – System administrators can override default behaviors