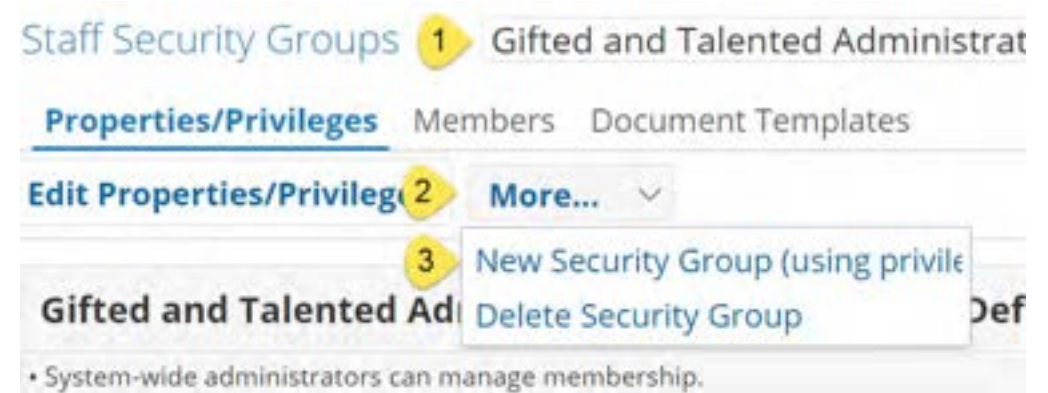# How to Click ….

- To Copy a Security Group
- To Assign PS SIS Role to a Security Group
- To Modify Security Group Privileges
- To Modify Document Template Security
- To Manually Manage Membership
- To Add a Supplemental Security Group to a User
- To Use SIS Integrated Security Preview

PowerSchool

To Copy a Security Group

1. Select Administration > Security
2. Open the default security group you want to make a copy of and select More > New Security Group

Staff Security Groups ① Gifted and Talented Administrat

Properties/Privileges   Members   Document Templates

Edit Properties/Privileg ② More... ˅

③ New Security Group (using privile
Gifted and Talented Ad   Delete Security Group   Def

• System-wide administrators can manage membership.

Name the new Security Group (Assign it to your new Category Optional)

New Security Group   Utilities

Security Group Name: My LEA Gifted Building Coordinator   Security

Category: **Demo Gifted Coordina** ˅   Configuratio

PS SIS User Access Role: _____ (optional)
(Must precisely match user access role name in PS SIS)

Messaging ID: _____ (optional)
(Allows messages to be sent to all group members. This ID must be prefixed with 'X:'.)

☑ Allow system-wide security administrators to manage membership of this group.
☑ Allow location-wide security administrators to manage membership of this group.

Accept   Cancel   ☑ Copy Document Template Rights from Original Security Group

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3

To Assign PS SIS User Access Role

1. Click to select and open a Security Group
2. Enter the PS SIS User Access Role (maps membership from PS SIS Role upon initial sign-in)

Edit Properties/Privileges

Security Group Name: Classroom Teacher (Security Group Default)

Category: **Building Staff (Securit** ⌄

PS SIS User Access Role: [ ] (optional)

(Must precisely match user access role name in PS SIS)

Messaging ID: [ ] (optional)

(Allows messages to be sent to all group members. This ID must be prefixed with 'X'.)

☑ Allow system-wide security administrators to manage membership of this group.

☑ Allow location-wide security administrators to manage membership of this group.

Accept   Cancel

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To Modify Security Privileges

1. From the Properties/Privileges tab
2. Navigate to the feature panel and modify the privileges as desired
3. If you are changing Student Profiles from System-wide to Location-wide, all privileges must match
4. Click Accept
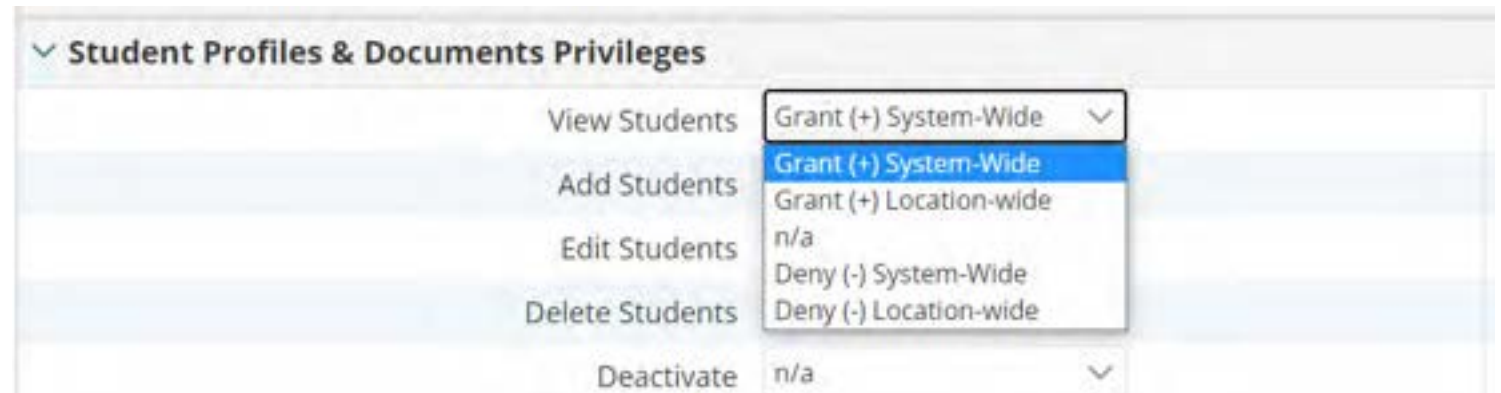
Remember –
- **System-wide indicates access to all data district-wide**
- **Location-wide indicates access to only building data based upon the user's active locations in SIS.**

To Modify Document Template Security

1. Select Document Templates tab
2. Click the magnifying icon to select the document template
3. Modify the View/Edit Rights

Document-Wide vs Section-Wide View/Edit Rights

Related Service Provider (Customer Configured) - Template Rights for 'Individualized Education Program'

- Document –Wide rights filter down to all sections
- If you wish to change a section right, click on the Section-Wide Edit Rights.

Add Edit Final section rights where documents have:
- Signatures
- Document Delivery – "office use only"
- Progress Reports

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7

To Manually Manage Membership

1. Administration > Security > Staff Security Groups
2. Click to select Security Group
3. Click Members
4. Select Add Members, search for and select as appropriate.
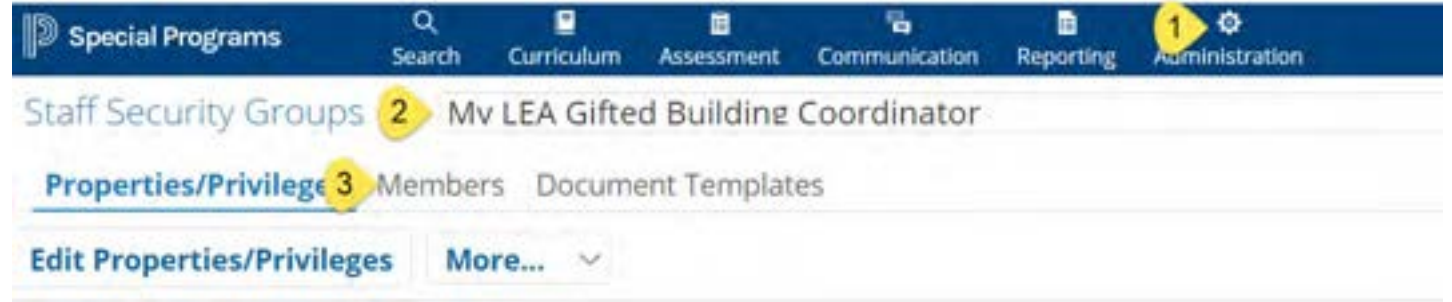
Membership is assigned based upon the PS SIS Role assignments in PS SIS the first time a user accesses Special Programs using SSO.

- If you remove the user from the Security Group manually, the user will be re-assigned the next time the user signs in
- You can manually *supplement* the PS SIS User Roles by manually adding to *additional* security groups
- You can manually assign if the user is not assigned to any PS SIS User Roles

To Add a Supplemental Security Group to a User

1. Select Search > Staff
2. Enter search criteria and select staff record
3. Select Security tab
4. Click Edit Security
5. Select Security group(s) as desired
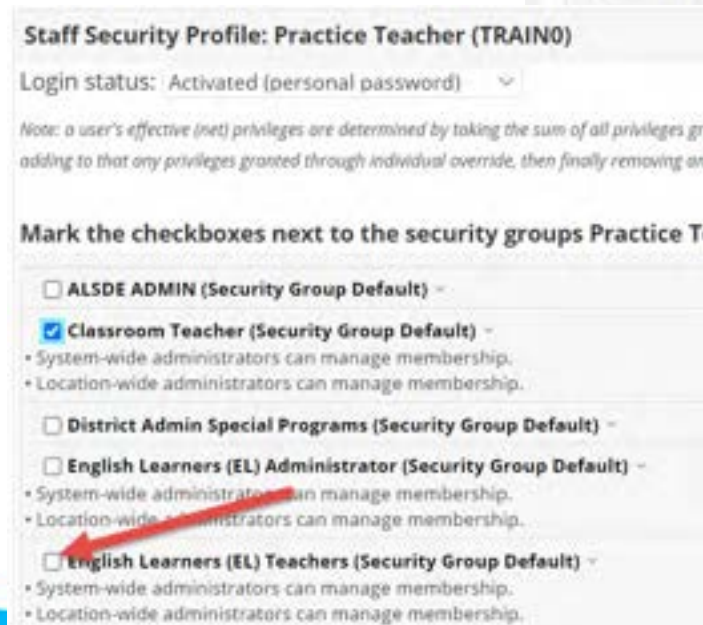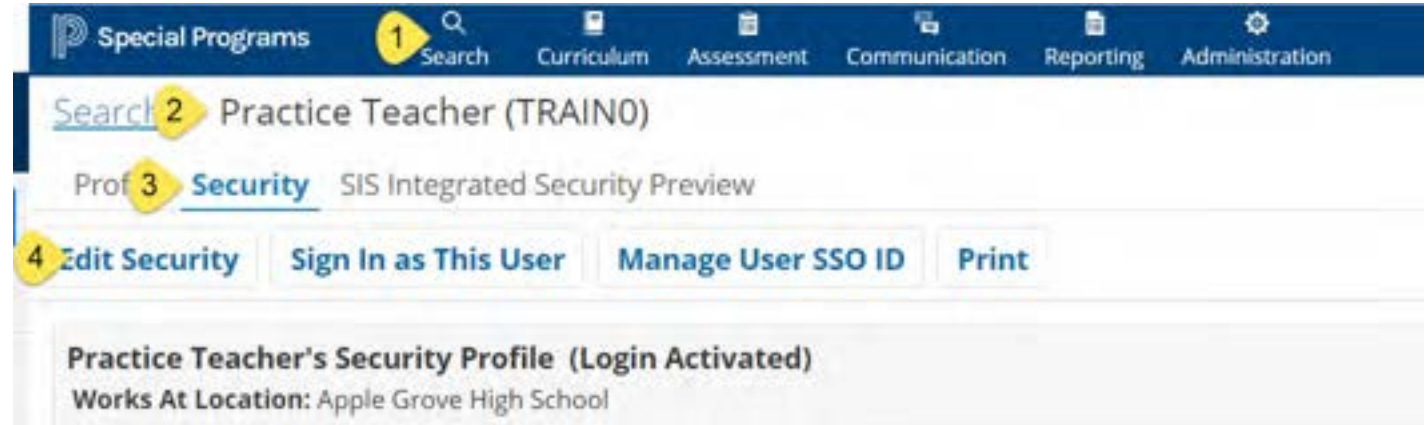
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- You can manually *supplement* the PS SIS User Roles by manually adding to *additional* security groups
- You can manually assign if the user is not assigned to any PS SIS User Roles

SIS Integrated Security Preview

1. Select Search > Staff
2. Enter search criteria and select staff record
3. Select Security tab
4. Click SIS Integrated Security Preview

Allows you to preview the security group membership to be assigned upon SSO.

If no assignments, check Role assignment in PS or verify role assigned to security group

Search >   )

Profile   Security   **SIS Integrated Security Preview**

Constrain Integrated Roles by Location? No ⌄

Send Message
Messages
Announcements
Calendar

Security Group	SIS User Access Role	Location	Change
Section 504 Administrator (Security Group Default)	504 Administrator	System-wide	ADD

Real World Tasks for Production Go Live

Tasks	Responsible Party	Due Date	Notes
Assigned the PS SIS User Access roles to each Default Security Group	Customer	Production Go Live Checklist	See Quick Reference Guide
Add Section Level Edit Final to all documents with Document Delivery	Customer	Production Go Live Checklist	Add Section-wide Edit Final rights to Progress Reports: IEP, Individual Instruction Plan (RTI), Tier 3 Instructional Plan (RTI)
Assign Member to Transfer Notification Group	Customer	Production Go Live Checklist	User(s) responsible for Receiving and Sending Transfer Envelopes
Adjust privileges on Staff to System wide			

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