



# PowerSchool Special Programs

## System Administration Fast Track

for Small Districts



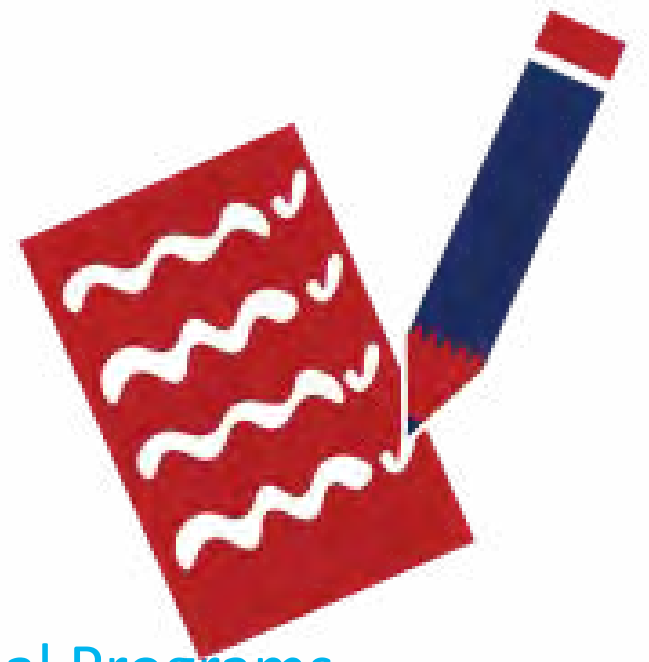
# Special Programs System Administration Fast Track is designed for small districts who plan to use Alabama Special Programs with standard default setups.

**In this 90-minute Fast Track session, you will learn:**

- Important information about the iNOW/SETS Migration process
- How to access Special Programs as 'ADMIN' and change the temporary password
- How to complete the Global Profile
- How to assign PS SIS User Groups to the Alabama Default Security Groups
- How to manually add a Staff Profile
- How to assign members to supplemental Security Groups
- How to modify Document Template Security

# Prerequisites:

- [Alabama Special Programs Product Overview](#)
- [Special Programs Integration Deep Dive](#)
- [Alabama Security \(Groups and Roles\) Deep Dive](#)
  
- Other resources for learning found on the [Alabama Special Programs Smartsheet](#)
  
- Handout needed for this presentation: [Alabama Security Quick Reference](#)



# The iNOW/SETS Data Migration

- What data is being migrated to Special Programs from iNOW/SETS?
- When is the cutover window?
- What can each district expect: access/downtime
- What is the process for verifying the migrated data
- When can we start creating and finalizing documents in Special Programs

# Important information about the data being migrated to Special Programs

## \*SETS Special Education Data

Special Education Status (Alert triggers)  
Referral/Evaluation/Eligibility  
Reevaluation  
IEP  
Transition  
Compliance Timelines

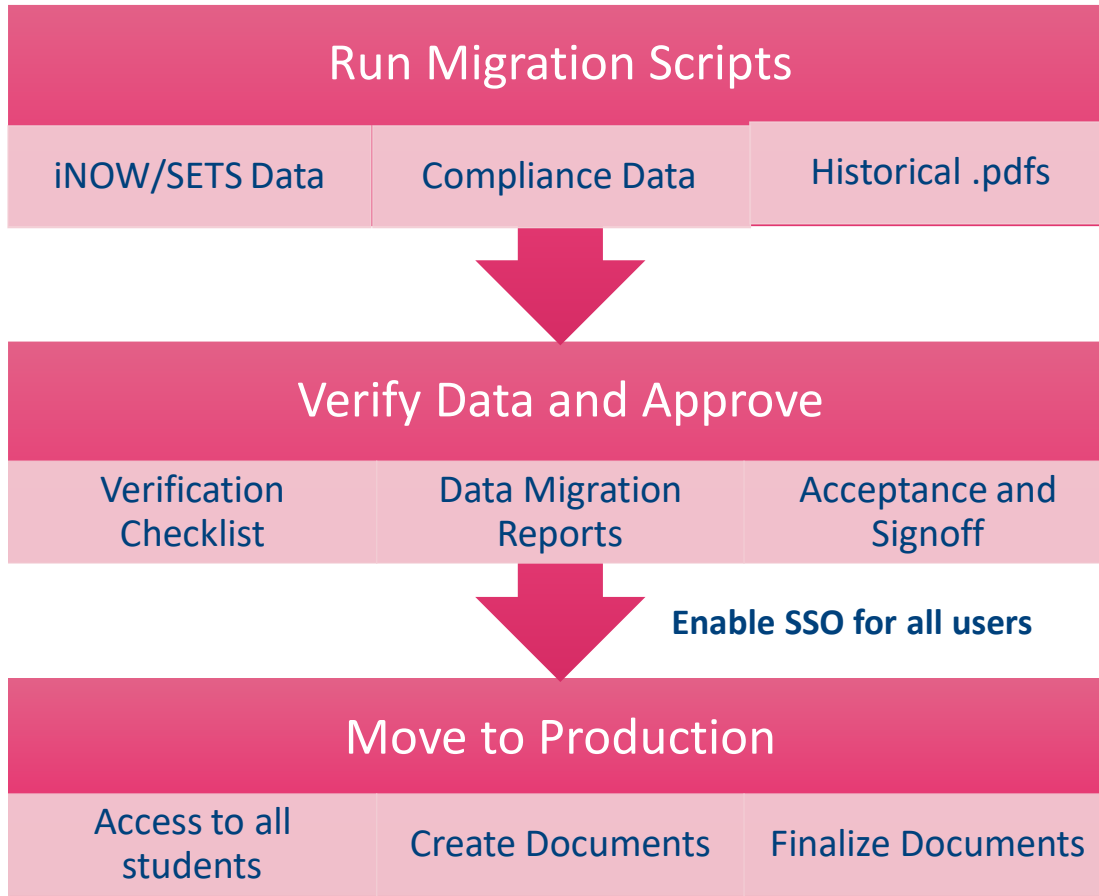
## \*Historical Documents

7 Years of history for active students will be migrated  
5 years history for inactive students  
Stored in Students Document library as file-based PDFs  
Stored by Year (based upon School Year)

\*Special Programs Profiles populated with SETS Data during migration

\*Student Documentation migrated as PDFs and stored in School Year of creation.

# Data Migration Process – Phased Cutovers



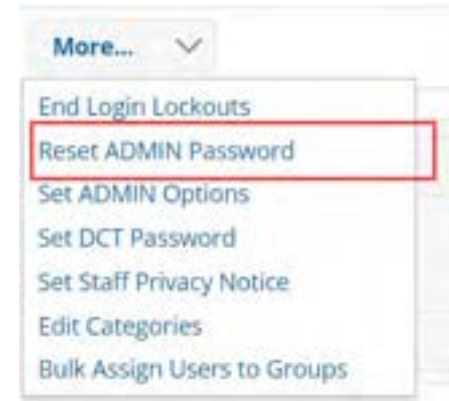
- Migrations will occur in phased cutovers. Our balanced approach is to combine in each phase:
  - Small
  - Medium
  - Large
- Cutover Window (Size Dependent)
  - Run Migration Scripts 4-5 days
  - Verify Data and Approve 2-3 days
  - Configure State Reporting Exports
  - "Go Live" in production
- Actual Migration Schedule to be available soon

# Step 1: Accessing Special Programs as 'ADMIN'

## ADMIN Account and Password

The “admin” account is the security administrator account which provides access to district administrative functions through the database URL.

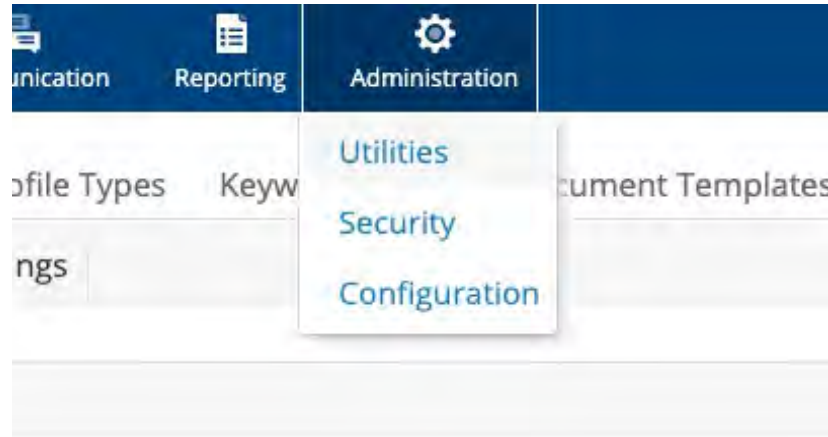
- You must be logged in as the security administrator (admin) to change the password
  - Administration > Security > More > Reset ADMIN Password



# Administration > Configuration

To navigate to your configuration options, select **Administration > Configuration**. Setups are available under the Administration menu option. Examples of default configurations:

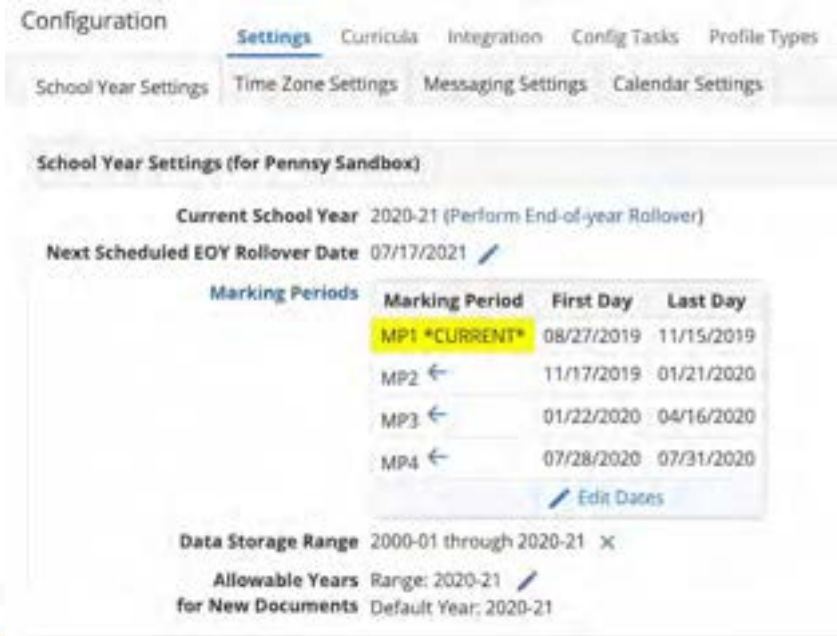
- Settings
- Profile





# Step 2: Review Configuration Settings

- Administration > Configuration > Settings



Configuration

Settings Curricula Integration Config Tasks Profile Types

School Year Settings Time Zone Settings Messaging Settings Calendar Settings

School Year Settings (for Penny Sandbox)

Current School Year 2020-21 (Perform End-of-year Rollover)

Next Scheduled EOY Rollover Date 07/17/2021

Marking Period	First Day	Last Day
MP1 *CURRENT*	08/27/2019	11/15/2019
MP2 ←	11/17/2019	01/21/2020
MP3 ←	01/22/2020	04/16/2020
MP4 ←	07/28/2020	07/31/2020

Edit Dates

Data Storage Range 2000-01 through 2020-21

Allowable Years for New Documents Range: 2020-21 Default Year: 2020-21



Special Programs

Search Curriculum Assessment Communication Reporting Administration

My Home Page

Utilities Security Configuration

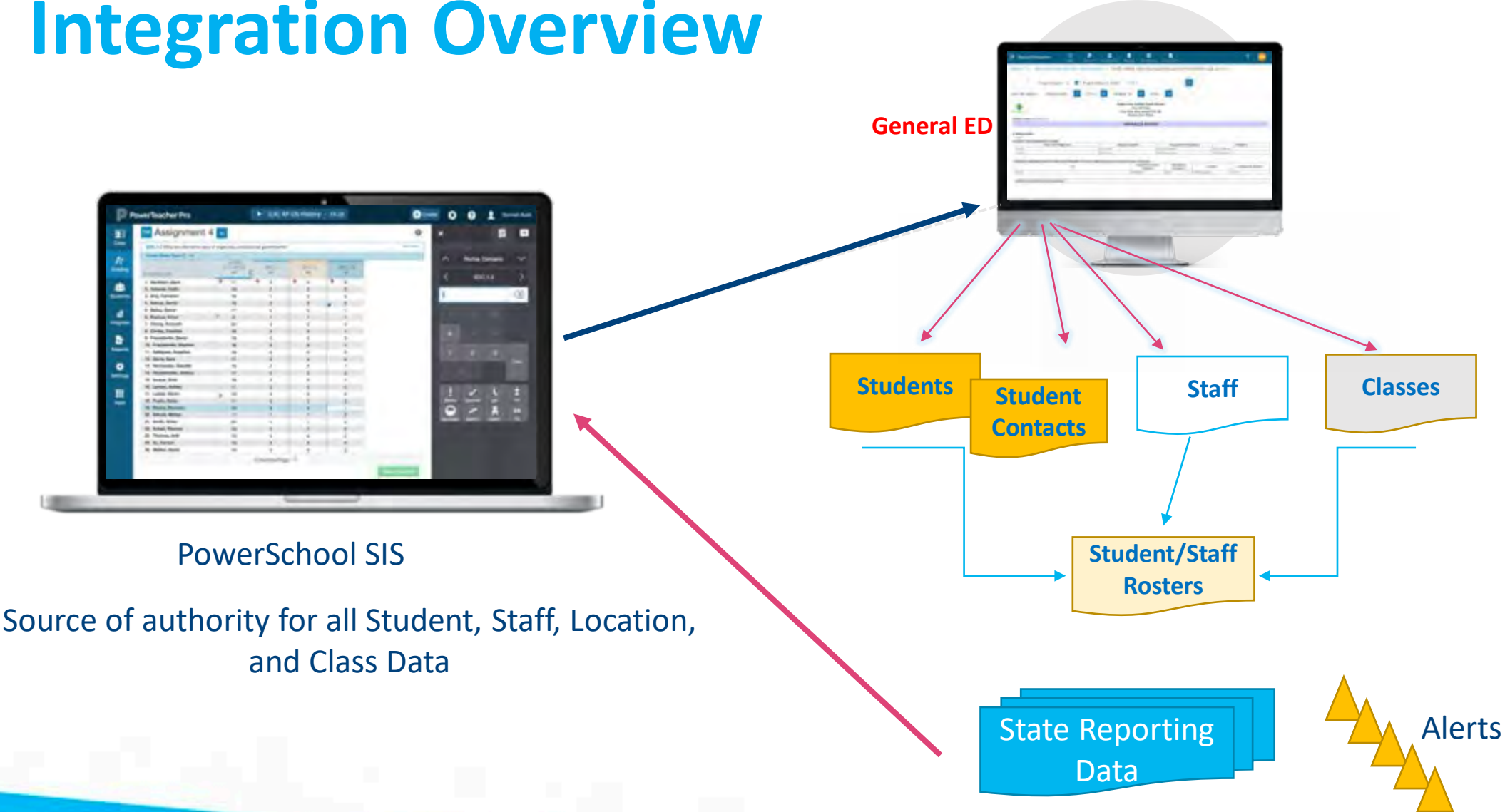
- School Year Settings
- Year End Rollover\*
- Marking Periods (Reference Only)
- Allowable Years for New Documents
- Time Zone Settings
- Calendar Settings (Reference Only)

\*Will be performed during Individual Data Migration Workshops post migration

# Step 3: Understanding Integration

\*\*\*In addition to the quick integration discussion here, please attend our Thursday office hours, starting May 3rd until June 11<sup>th</sup>:  
[Integration \(Troubleshooting 101\) 8:30-11:30](#) OR  
[12:30-3:30](#)

# Integration Overview



# Model Import Layouts

- General Ed Students
- Students
- Staff
- Classes
- Class Staff
- Class Student
- Locations
- Alternate Locations
- District
- State Related


🔍	PowerSchool - Staff Change Notification (model)	Staff	PowerSchool SIS Rest API
🔍	PowerSchool - Staff Import (model)	Staff	PowerSchool SIS Rest API
🔍	PowerSchool - Student Change Notification (model)	Students	PowerSchool SIS Rest API
🔍	PowerSchool - Student Import (model)	Students	PowerSchool SIS Rest

Change Notifications are delta changes in PS SIS based on server polling of import layout data fields

Server controlled daily imports are a full refresh of PS SIS imported data fields scheduled "off peak" hours

# Continuous Integration Monitoring

Integration > Continuous Integration Settings

Send Message 

- Messages
- Announcements
- Calendar

**Edit SIS Instance**

Data Source PowerSchool SIS Rest API


Type

Instance ID MON

Instance Name

External System Version 20.11.0

Import Enabled?

Export Enabled?  

Testing  Perform OneTime Immediate Import Enabled

Imports and Exports are currently running in all databases (with the exception of Class Imports)

Post Production Integration Monitoring is required for Go Live Signoff

Notification Email Address PSSP\_Integrations@powerschool.c

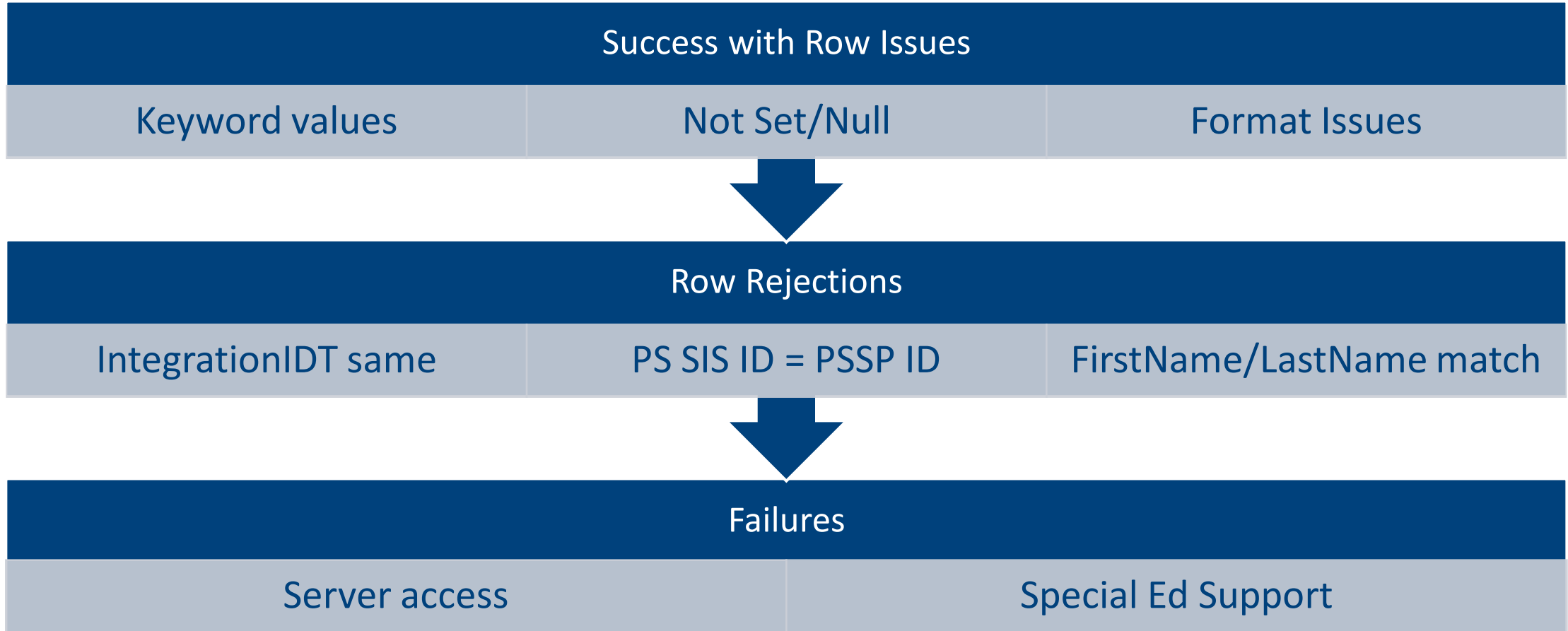
Separate multiple addresses with a comma

Notification  Failed Imports

Events  Imports with Row Issues

Successful Imports

# Troubleshooting Integration Issues



\*\*\*\*\*Special Education Support  
<specialeducationsupport@powerschool.com>;

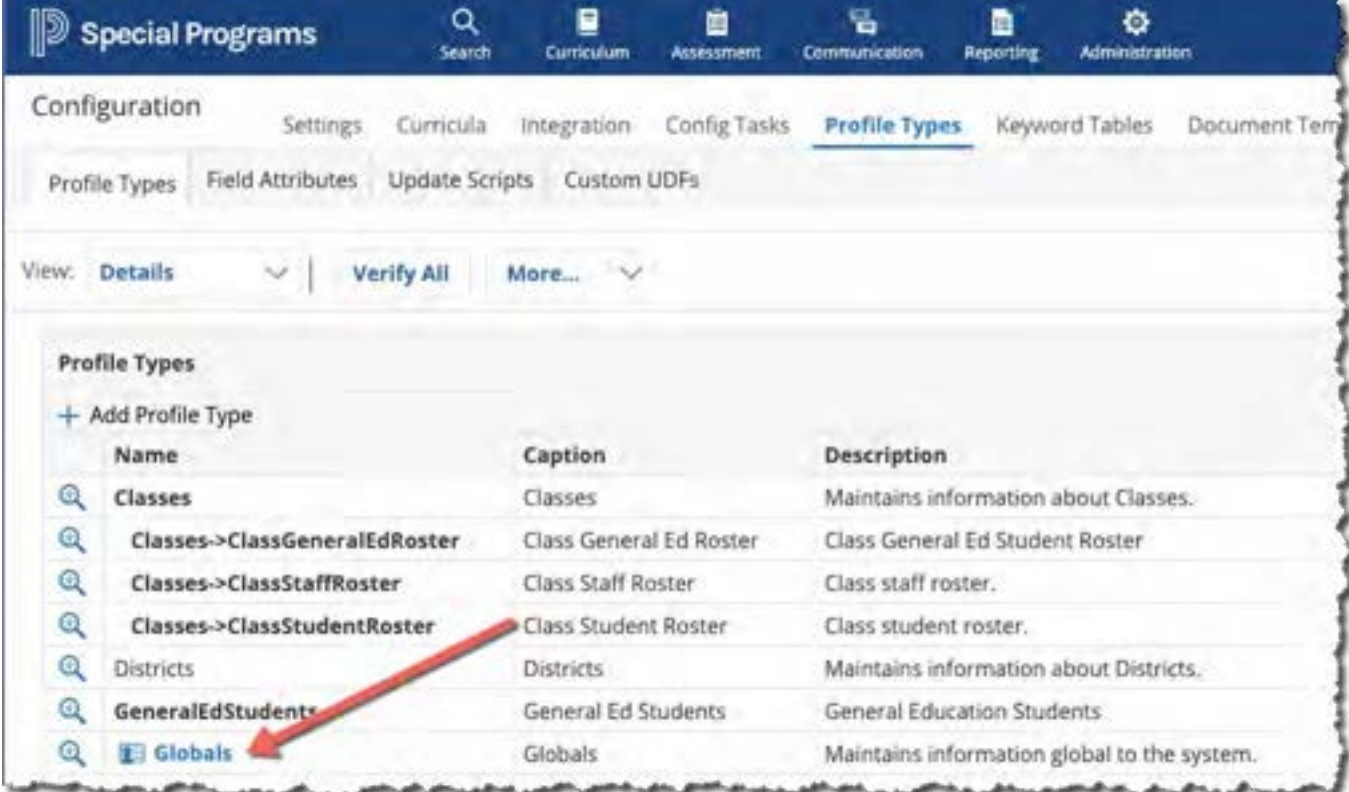
# Step 4: Configure Global Profile

Global profiles are important because they control your district name. There is currently a default in place, we need to make sure it is correct.

# Global Profiles

Administration > Configuration > Profile Types > Globals

- Complete District information
- Upload logo if desired
- Complete Calendar options
  - Beginning/end of school year and reporting dates
  - Federal Reporting Date (Child Count Day)



The screenshot shows the 'Special Programs' software interface. The top navigation bar includes 'Search', 'Curriculum', 'Assessment', 'Communication', 'Reporting', and 'Administration'. The main menu is 'Configuration', with sub-menus for 'Settings', 'Curricula', 'Integration', 'Config Tasks', 'Profile Types', 'Keyword Tables', and 'Document Templates'. The 'Profile Types' sub-menu is active, showing options for 'Field Attributes', 'Update Scripts', and 'Custom UDFs'. Below this, there are 'View: Details' and 'Verify All' buttons. The main content area is titled 'Profile Types' and includes a '+ Add Profile Type' button. A table lists the following profile types:

Name	Caption	Description
Classes	Classes	Maintains information about Classes.
Classes->ClassGeneralEdRoster	Class General Ed Roster	Class General Ed Student Roster
Classes->ClassStaffRoster	Class Staff Roster	Class staff roster.
Classes->ClassStudentRoster	Class Student Roster	Class student roster.
Districts	Districts	Maintains information about Districts.
GeneralEdStudents	General Ed Students	General Education Students
Globals	Globals	Maintains information global to the system.

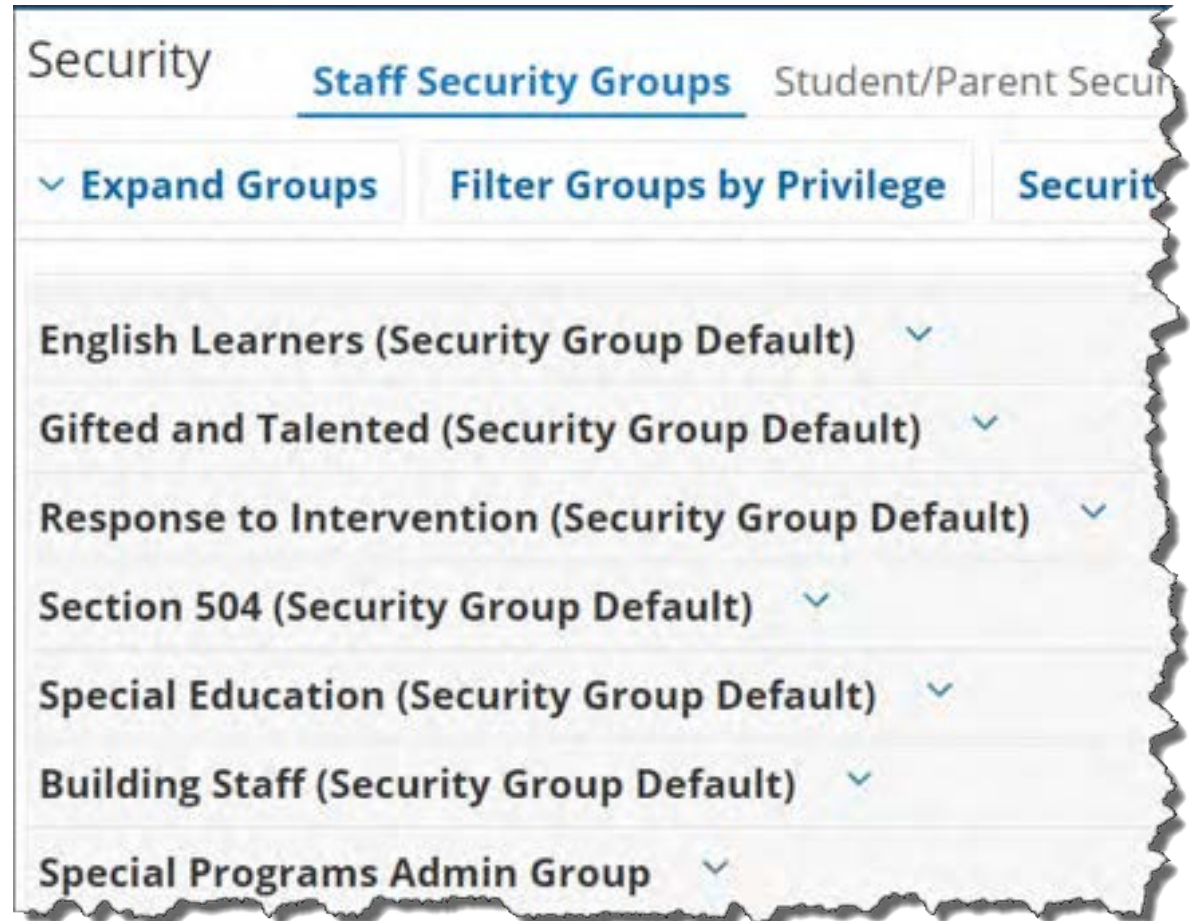
A red arrow points to the 'Globals' row in the table.



# Default Alabama Security Categories and Groups

Default Security Categories are:

- Special Programs Admin
- Special Education
- Gifted and Talented
- Section 504
- Response to Intervention
- English Learners
- Building Staff



# Step 5: Understanding Security Groups

Every Security Group is composed of:

- Properties/Privileges
- Document Templates
- Members

Staff Security Groups > Special Education Administrators

Properties/Privileges **Members** Document Templates

Filter by: (None)

Add Members Remove Members More...

**Special Education Administrators - Members**

Page size: 20

ID	Last Name	First Name	Works At
TRAIN97	Account97	Training	Warren Area HS
TRAIN79	Adams	MelissaM	Upper Adams MS
TRAIN83	Alba	Anna	Silver Spring El Sch
IARCHIBALD	Archibald	Jane	Upper Darby SHS

Staff Security Groups > Special Education Administrators

**Properties/Privileges** Members Document Templates

Edit Properties/Privileges More...

**Special Education Administrators - Properties/Privileges**

Privilege Set

**Communications / Calendar**

- (+) Send Messages
- (+) Send Announcements (System-Wide)

**Reports**

- (+) Create Private Standard Reports
- (+) View Public Standard Reports
- (+) Create Edit Public Standard Reports
- (+) View Advanced Reports

Staff Security Groups > Special Education Administrators

Properties/Privileges Members **Document Templates**

Select Template/Category: (Summary)

**Special Education Administrators - Template/Category Rights Summary**

Document Templates/Categories	View/Edit Rights						
	View	View Final Only	View if Owner	Edit Create	Edit Draft	Edit Review	Edit Final
<b>Section 504</b>	●	-	●	●	●	●	●
Section 504 - Plan	●	-	-	●	●	●	●
Section 504 - Meeting Notice and Invitation	●	-	-	●	●	●	●
Section 504 - Eligibility	●	-	-	●	●	●	●
Section 504 - Manifestation Determination Review	●	-	-	●	●	●	●
Parents Rights	●	-	-	●	●	●	●
Authorization for Release/Exchange of Information	●	-	-	●	●	●	●
Written Notice/Consent	●	-	-	●	●	●	●

# Step 6: Alabama Default Security Groups and PS SIS User Access Roles

Your Alabama Special Programs has pre-configured security groups.

You may use these security groups “as is” without modification but you will need to assign PS SIS User Access Roles to each Security Group as noted on the following slides.

If you wish to modify any of the default security groups, we recommend you attend either the [morning Office Hour Sessions on Security](#) or the [Afternoon Office Hour Sessions on Security](#) or watch the following videos.

# 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**

# 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



Staff Security Groups > 1 Gifted and Talented Administrator (Security Group Default) Utilities  
 Properties/Privileges Members Document Templates Security Configuration

Select Profile Type: **Students** Select Template/Category: **Gifted Education Plan**

### Gifted and Talented Administrator (Security Group Default) - Template Rights for 'Gifted Education Plan'

2 (Edit)

Document-Wide Rights	Document-Wide View/Edit Rights							Status Change Rights			Print	Review Acknowledge	Attach Files		Attach to Final	Edit Public Banks	Final
	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review			Set Final	Files by Others			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*These rights can alternatively be assigned for individual sections*

*User must also have editing right for current document status*

Section Name	View	Edit Draft	Edit Review	Edit Final	Translate
Gifted Education Plan	X	X	X		



# Document-Wide vs Section-Wide View/Edit Rights

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

**1** (Edit)

**Document-Wide View/Edit Rights**

	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete
Document-Wide Rights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*These rights can alternatively be assigned for individual sections*

**2** (Edit)

**Section-Wide View/Edit Rights**

Section Name	View	Edit Draft	Edit Review	Edit Final	Translate
Student Profile (Cover Page)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student Profile (Continued)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transition Goal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Annual Goal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Signature Page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: Document Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: Progress Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Status Change Rights**

Set Draft	Set Review	Set Final	Review	Submit to DocuSign	Attach Files by Others	Attach Files to Final Documents	Edit Public Statement Banks	Force Finalize
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*User must also have editing right for current document status*

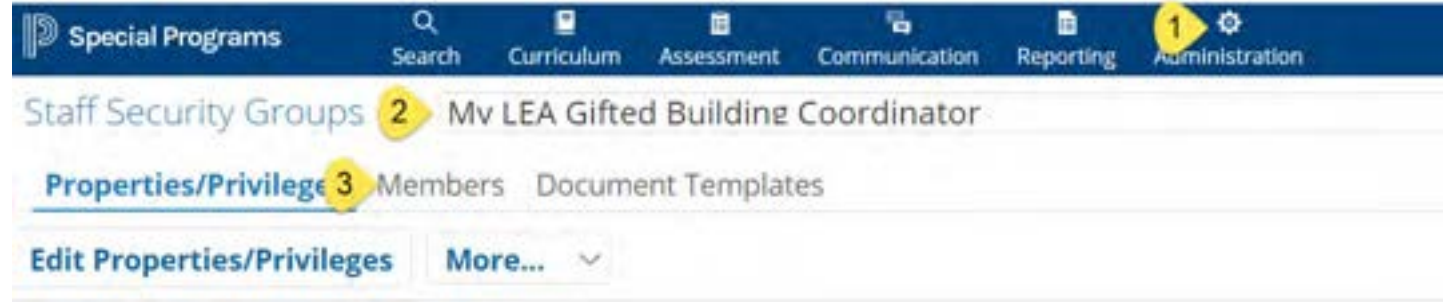
- Document –Wide rights filter down to all sections
- If you wish to change a section right, click on the Section-Wide Edit Rights.

Add Edit Final section rights where documents have:

- Signatures
- Document Delivery – “office use only”
- Progress Reports

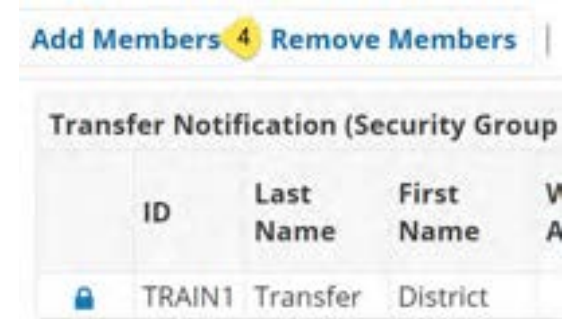
# To Manually Manage Membership

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.



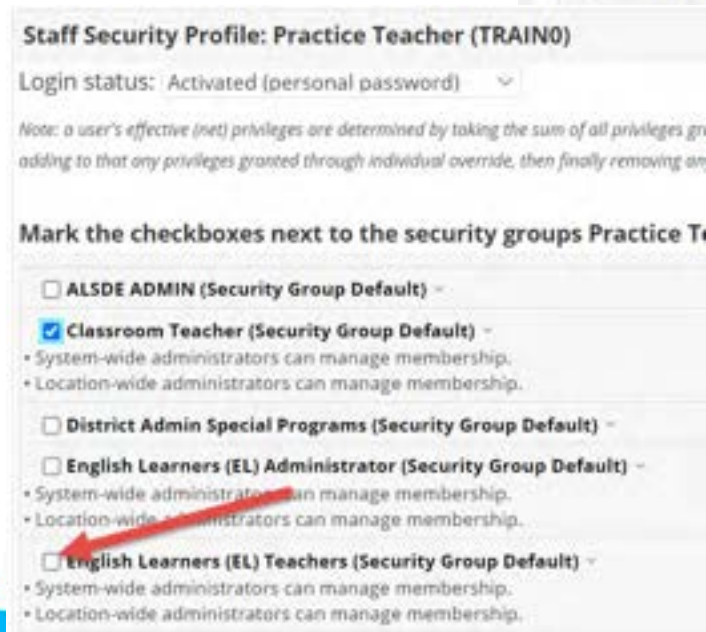
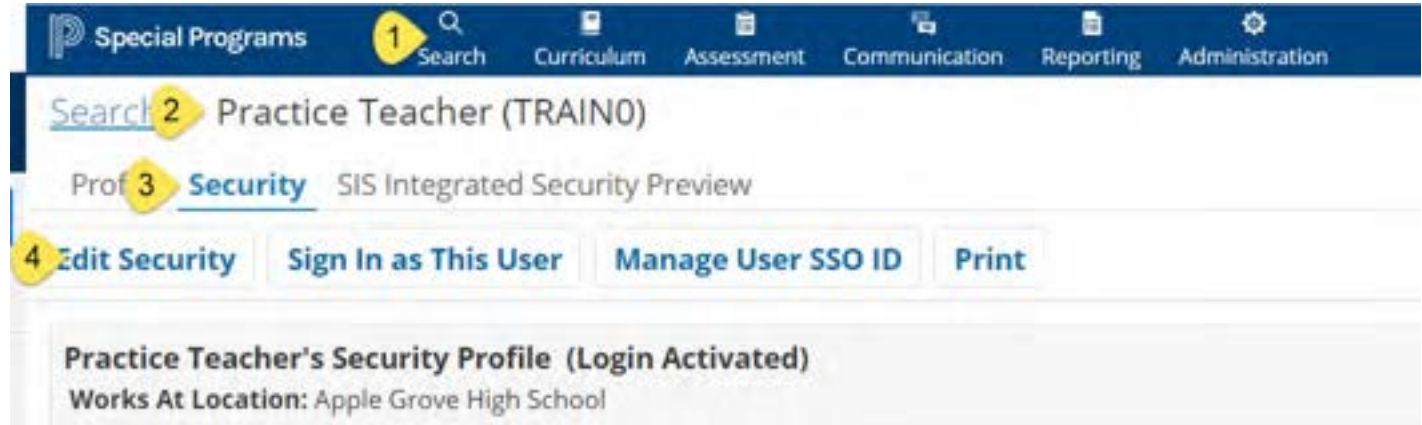
***Membership is assigned based upon the PS SIS Role assignments in PS SIS the first time a user accesses Special Programs using SSO.***

- 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



- 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



# Production Go Live **Critical** Task Checklist

Tasks	Responsible Party	Due Date	Notes
Reset admin password	Customer	ASAP	Complete today
Complete your Global Profile setup	Customer	ASAP	
Assign PS SIS User Access Roles	Customer	Production Go Live Checklist	
Determine who will monitor continuous integration	Customer	Production Go Live Checklist	
Identify your Migration Validation Team	Customer	Production Go Live Checklist	
Attend Office Hours Sessions	Customer	Production Go Live Checklist	

**Risk:** If you do not complete your checklist and pre-requisites, you will delay your migration

**Benefit:** Completing your tasks and pre-requisites will allow you to migrate on time

# Upcoming Office Hour Learning Sessions

Tasks	Date	Time	Notes
Mondays- Security (Production Ready Tasks)	May 3- June 11	<a href="#"><u>8:30-11:30</u></a> <a href="#"><u>12:30-3:30</u></a>	Completing Security Set up tasks
Tuesdays-Utilities (Transfer Students and Case Manager Assignments)	May 3- June 11	<a href="#"><u>8:30-11:30</u></a> <a href="#"><u>12:30-3:30</u></a>	Preparing for Back to SchoolMigration
Wednesdays- Reports (Preparing for Migration Review)	May 3- June 11	<a href="#"><u>8:30-11:30</u></a> <a href="#"><u>12:30-3:30</u></a>	Preparing for Migration Review
Thursdays- Integration (Troubleshooting 101)	May 3- June 11	<a href="#"><u>8:30-11:30</u></a> <a href="#"><u>12:30-3:30</u></a>	Troubleshooting 101

Information for all Webinars can be found on our [Alabama Special Programs Office Hours and Webinars smartsheet.](#)

# Quick Quiz

- How many years of historical documents will be migrated for ACTIVE students?
- What is the source of all demographic and contact data in Special Programs?
- What is the process called that takes a student from SIS to General Education to the Student Table?
- What happens if you change a staff/teachers name in SIS?
- What is the name of the profile that controls your district's name?
- What ties membership to a security group in Special Programs when a user is setup in SIS?

Thank  
you