

# Welcome to the Special Programs PowerSchool PowerUp!



October 10, 2023

# Today's Agenda

- Welcome and Overview
- Platform Release 26.6.3.0 Highlights
- Special Programs Security
  - System Administrator vs. ADMIN
  - Staff Security Groups
    - Properties/Privileges
    - Members
    - Document Templates
  - Audit Log
  - Staff Security Settings
  - How to Add a New Security Group
    - Planning for Security Groups
  - Profile Security



# Meet the Team

## Robyn Skidmore

*Senior Education Impact Consultant*

- Retired educator - 26 years
  - Special Educator
  - Reading Specialist
- PowerSchool – 4 years
- Special Programs – 3 years



## Special Programs Support

- Our Support Team is on the call to assist with technical questions.
- Please submit your questions into the Q&A during presentation.
- There will be time for additional Q&A at end of the meeting.



# Platform Release Highlights

Version SPPL 23.6.3.0

Release Date: September 15, 2023

# New Features and Enhancements

## **Attachments and Links Are Accessible From the Document Template ESS Request for Services [ESSTeam] in Reports**

- Reports with attachments and links are now accessible from the document template ESS Request for Services [ESSTeam]

## **Refresh Data on Standard Reports**

- Renamed the Refresh button on Standard Reports to Refresh Data. If report data has not been refreshed for a few minutes, it will show a time next to Refresh Data that the data is from. For example, if a user works with data and has not refreshed the report since 11:33 a.m., the button will say Refresh Data (from 11:33 a.m.) instead of just Refresh Data

## **Staff Who Can Access Multiple Tenants Can Run Reports Over All Tenants**

- Users with access to multiple tenants can now run reports pushed out to all tenants over all the tenants they have access to, consolidating the data into

# New Features and Enhancements

## **State | Regional Controller Ability To Search for Students Using the Quick Access Search Student**

- Staff with appropriate security privileges to search for students in Tenants can now search for students using the Quick Access Search Student option in the State | Regional Controller

## **The Merged Profiles Reflect PowerSchool SIS Data Post Nightly Sync Runs**

- The Merged Profiles Reflect PowerSchool SIS Data Post Nightly Sync Runs

# Resolved Issues

## Digital Signature Does Not Work for Customers Using DocuSign Earlier

- This resolution addresses the issue of the digital signature functionality not working for customers who previously used DocuSign

# Special Programs Security



# System Administrator VS ADMIN

System Administrator	ADMIN
Can create staff profiles outside of SIS and assign caseloads to staff members	Can access, monitor, and alter data flow between documents, profiles, and SIS
Can access all documents and profiles within system	Can control and alter data integration and migration
Assigned based on role in SIS	Can control all security features for each user and Document
	Requires an additional password for second log-in
Use for Day-to-Day activities	Only use ADMIN accounts except when necessary

# Administration > Configuration > Security

Special Programs

Search

Curriculum

Assessment

Communication

Reporting

Administration

Security

Staff Security Groups

Student/Parent Security

Sessions

Audit Log

Exception Log

Expand Groups

Filter Groups by Privilege

Security Settings

New Security Group

Print

More...

01

Admin rev\_acknowledge

Building Admin

Customer Ed Training

End Login Lockouts

Reset ADMIN Password

Set DCT Password

Set Staff Privacy Notice

Edit Categories

Bulk Assign Users to Groups

# Security Groups in Special Programs



- Security groups are created to **control user access to the various privileges, profile sections and document templates inside Special Programs.**
- These groups ensure that users **have only the permissions they need to provide the necessary services to students.**
- Each user type is assigned to a security group that **defines the function or role that users of that user type can perform** such as: curriculum administration, student assessment, teachers, child study team members, and so forth.
- The members of a security group have **access privileges associated with that group.**

# Security – Staff Security Groups

## Default Security Groups:

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

Security	<u>Staff Security Groups</u>	Student/Parent Security
▼ Expand Groups	Filter Groups by Privilege	Security
English Learners (Security Group Default) ▼		
Gifted and Talented (Security Group Default) ▼		
Response to Intervention (Security Group Default) ▼		
Section 504 (Security Group Default) ▼		
Special Education (Security Group Default) ▼		
Building Staff (Security Group Default) ▼		
Special Programs Admin Group ▼		

# Staff Security Groups

Security configuration includes setting up:

- Properties/Privileges
- Members
- Document Templates

Staff Security Groups > Special Education Administrators

Properties/Privileges **Members** Document Templates

Filter by: (None)

[Add Members](#) [Remove Members](#) [More...](#)

**Special Education Administrators - Members**

K < 1 2 3 4 > X 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
🔒	WASHBURD	Archibald	Jane	Upper Adams MS

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	Create	Edit Draft	Edit Review
<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	●	-	-	●	●	●

# Properties & Privileges

1. Start on the **Properties/Privileges** tab.
2. Navigate to the **feature panel** and modify the privileges as needed.
3. If you are changing security from System-wide to Location-wide, ***all privileges must match.***
4. Click **Accept**.

Student Profiles & Documents Privileges	
View Students	Grant (+) System-Wide
Add Students	Grant (+) System-Wide
Edit Students	Grant (+) Location-wide
Delete Students	n/a
	Deny (-) System-Wide
	Deny (-) Location-wide
Deactivate	n/a



## Please Note:

- 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.

# Properties & Privileges: Special Access

Access My Classes	Allows users to see/access the Classes panel on their Homepage. Their current class schedule will be listed, and users can view exceptional education students on their rosters
Access My Future Classes	Allows users to see/access the Classes panel on their Homepage with future classes listed.
Access My Caseload	Allows users to see/access the My Students Table on their homepage. The My Students Table is synonymous with a user's caseload
Edit My Standard Caseload	Users can edit their standard caseload by adding and removing students.
Edit My Case Manager Caseload	Users can edit their case manager caseload by adding and removing students. There can only be one case manager per student in the system.
On Demand Import	Users can import a general education student as a student profile

# Properties & Privileges: Reports

Create Private Standard Reports	User can access the Standard Reports menu to create private list and multidimensional reports viewable only by creator
View Public Standard Reports	Users can create unique list and multidimensional reports that can be viewable by each user that has the ability to see to view public reports. Users can edit any public report.
Create/Edit Public Standard Reports	Users can create unique list and multidimensional reports that can be viewable by each user that has the ability to see to view public reports. Users can edit any public report.
Admin Public Reports	Users can access and view Advanced Reports
View Advanced Reports	Users can access and view Advanced Reports
Process/Unprocess Advanced Reports	Users can set timeframes to run reports in the Advanced Reports menu
Share Private Reports	Users can share their private reports with specific security groups. This will not make the report a Public Report.
Publish Shared Reports	Users can publish public reports to user homepages by security group; a direct link will appear in the Reports panel.



# Properties & Privileges: System Admin

Manage Staff Security	Users can manage security group membership, even outside of being in the ADMIN role. Security groups must have System-wide or Location-wide management enabled.
Manage Student/Parent Security	Users can manage login access and reset passwords for students and parents to access the Parent Portal
Manage User Session	Users can access and forcibly end user sessions
Access Audit Log	Users can view the overall system Audit Log and by specific information topics (Student Profiles, Documents, Reports, etc.)
Log in as Other Users for Support	Allows users to impersonate users to see the platform through their experience.
Assume System Admin Role	Users can assume the superuser System ADMIN role to manage securities and configuration. Users will need the common district ADMIN passcode to actually assume the role
Translate document templates	Users can use integrated machine translation capabilities to translate forms at the district level.
Edit Public Statement Banks	Users can edit and maintain document statement banks at the district or location level.
Send Announcements	Users can draft and send announcements of any priority level (low, normal, high) and share by security group.
Send Red Alert Announcements	Users can draft and send red alert announcements and share by security group.

# Properties & Privileges: Student Profiles & Documents

View Students	Users can view student profiles within the level of access granted
Add Students	Users can manually add student profiles that exist outside of the SIS.
Edit Students	Users can edit information within student profiles. Any information edited in the profiles without being updated in the SIS will be written over in overnight sync.
Delete Students	Users can delete student profiles.
Deactivate	Users can manually deactivate student profiles.
Reactivate	Users can manually reactivate student profiles
Access Documents	Users can view the student documents tab within the student profile. Document securities must be set for users to see document templates.

# Properties & Privileges: Student Profiles & Documents

Access Events	Users can view the events tab in the student profile.
Create/Edit Template Documents	Users can create and edit student document templates. Rights must be further set in document template securities.
Translate Template Documents	Users can translate individual student documents. Rights must be further set in document template securities.
Create/Edit Own Events	Users can manually create their own events for students and edit existing events created by the same user.
Edit Events by Other Users	Users can edit events created by other users.
Maintain Own File-Based Documents	Edit documents that have been uploaded by other users.
Edit File-Based Documents from Other Users	Edit documents that have been uploaded by other users.
Unfinalize File-Based Documents	Users can unfinalized file-based documents to delete them.

# Properties & Privileges: Student Profiles & Documents

Undelete Documents	Users can undelete previously deleted documents
Send Documents Via Docu Sign	Users can access the Utilities menu to send student transfer information to other districts.
Send Transfer Envelopes	Users can access the Utilities menu to send student transfer information to other districts.
Receive Transfer Envelopes	Users can access the Utilities menu to receive student transfer information from other districts.

# Properties & Privileges: Student Profiles

\* Each security privilege grouping is tied to a separate section of the student profile. These sections are optionally used as recordkeeping tools.

View XXXXX	Users can view information stored in this part of the student profile.
Add XXXXX	Users can manually add information to this part of the student profile.
Edit XXXXX	Users can edit previously added information in this part of the student profile.
Delete XXXXX	Users can delete previously added information in this part of the student profile.
Use Data Utilities: XXXXX	Users can access the Utilities menu to mass update information in this part of the student profile.

# Properties & Privileges: Class Profiles

\* These securities follow the same cadence of permissions. Each security privilege grouping is tied to a separate section of the Class profile.

View Classes	Users can view information stored in this part of the class profile.
Add Classes	Users can manually add information to this part of the class profile.
Edit Classes	Users can edit previously added information in this part of the class profile
Delete Classes	Users can delete previously added information in this part of the class profile.
Use Data Utilities: Classes	Users can access the Utilities menu to mass update information in this part of the class profile.

# Properties & Privileges: Globals Profiles

\* These securities follow the same cadence of permissions. Each security privilege grouping is tied to a separate section of the Globals profile.

View Globals	Users can view the Globals profile in the Profile Configuration menu.
Edit Globals	Users can edit information in the Globals profile.

# Properties & Privileges: Locations Profiles

\* These securities follow the same cadence of permissions. Each security privilege grouping is tied to a separate section of the Locations profile.

View Locations	Users can view information stored in the location profile.
Add Locations	Users can manually add locations profiles.
Edit Locations	Users can edit previously added information in locations profiles.
Delete Locations	Users can delete locations profiles.
Deactivate	Users can deactivate locations profiles.
Reactivate	Users can reactivate locations profiles.
Use Data Utilities: Locations	Users can access the Utilities menu to mass update information in this part of the student profile.



# Properties & Privileges: Staff Profiles

\* These securities follow the same cadence of permissions. Each security privilege grouping is tied to a separate section of the Staff profile.

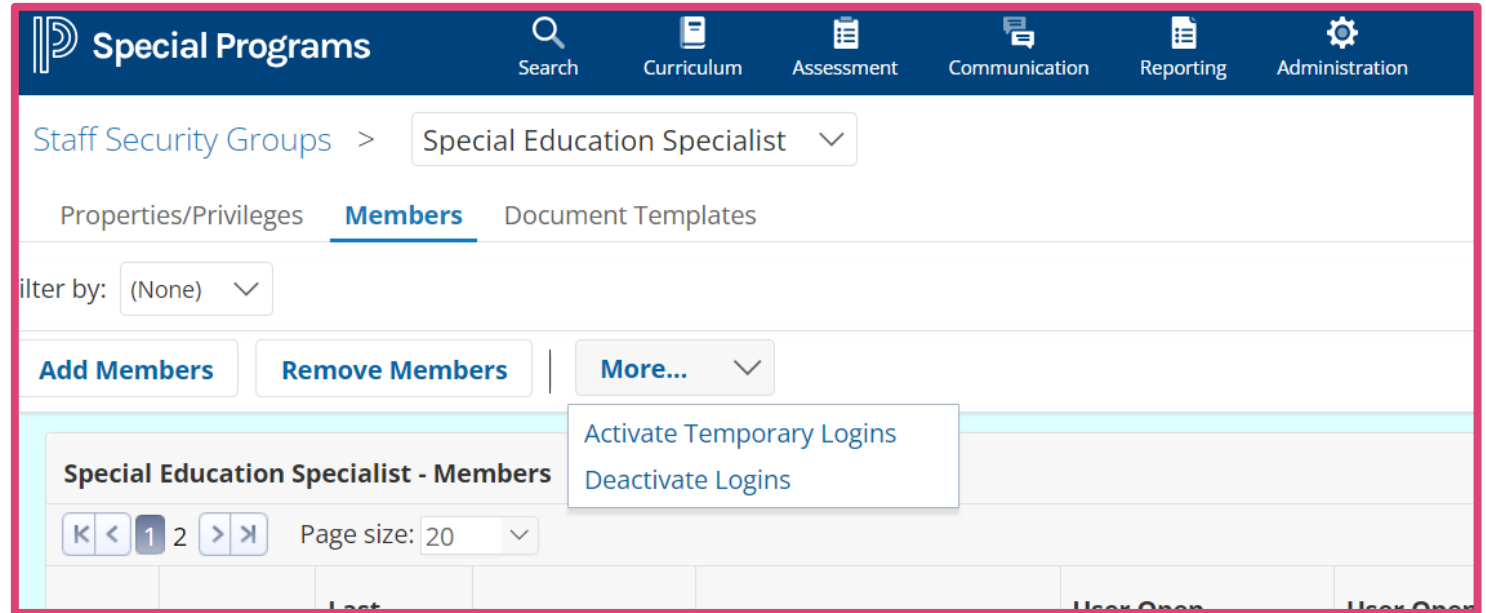
View Staff	Users can view information stored in the location profile.
Add Staff	Users can manually add locations profiles.
Edit Staff	Users can edit previously added information in locations profiles.
Delete Staff	Users can delete locations profiles.
Use Data Utilities: Staff	Users can access the Utilities menu to mass update information in this part of the student profile.

# Properties & Privileges: Gen Ed Profile

View General Ed Students	Users can view information stored in the General Ed Students profile.
Add General Ed Students	Users can manually add information in General Ed Students profile.
Edit General Ed Students	Users can edit previously added information.
Delete General Ed Students	Users can delete General Ed Students profile.
Use Data Utilities: General Ed Students	Users can access the Utilities menu to mass update information in this part of the student profile.

# Managing Membership

1. Select **Security Group**.
2. Click **Members**
3. Select **Add Members**.

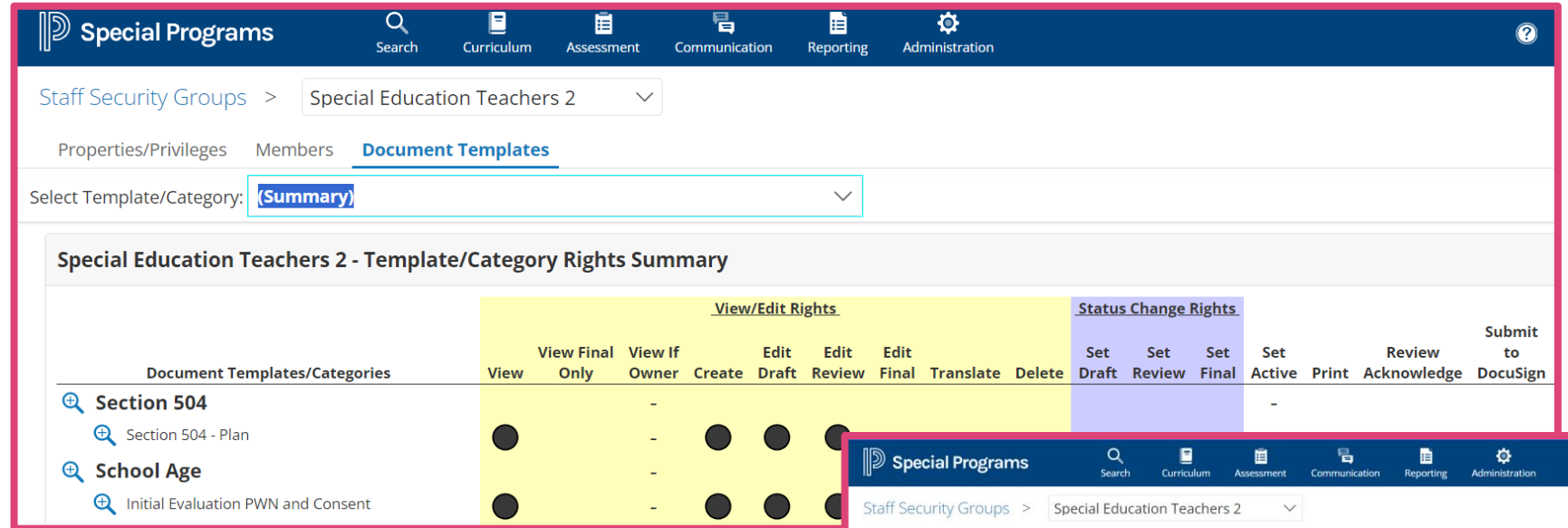


**Please Note:** Membership is assigned based upon the PS SIS User Role assignments the first time a user accesses Special Programs using SSO

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

# Document Template Security

1. Select **Document Templates** tab.
2. Click the **magnifying glass icon** to select the document template.
3. Select **Pencil to Edit**.



Special Programs

Staff Security Groups > Special Education Teachers 2

Properties/Privileges Members **Document Templates**

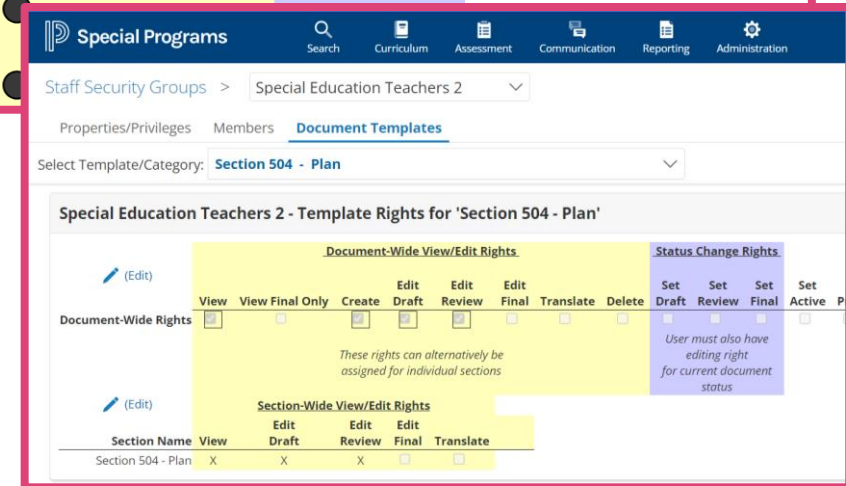
Select Template/Category: **Summary**

Special Education Teachers 2 - Template/Category Rights Summary

Document Templates/Categories	View/Edit Rights								Status Change Rights				Review Acknowledge	Submit to DocuSign
	View	View Final Only	View If Owner	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final		
<b>Section 504</b>			-											
Section 504 - Plan	●		-	●	●	●								
<b>School Age</b>			-											
Initial Evaluation PWN and Consent	●		-	●	●	●								



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



Special Programs

Staff Security Groups > Special Education Teachers 2

Properties/Privileges Members **Document Templates**

Select Template/Category: **Section 504 - Plan**

Special Education Teachers 2 - Template Rights for 'Section 504 - Plan'

Document Templates/Categories	Document-Wide View/Edit Rights								Status Change Rights				Review Acknowledge	Submit to DocuSign
	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final	Set Active		
<b>Document-Wide Rights</b>	<input checked="" 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														
<b>Section-Wide View/Edit Rights</b>														
Section 504 - Plan	X	X	X	X	X	X	X	X	X	X	X	X	X	

User must also have editing right for current document status

# Audit Log

The screenshot shows the 'Special Programs' application interface. At the top is a navigation bar with icons for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this is a sub-navigation bar with 'Security' selected, and links for 'Staff Security Groups', 'Student/Parent Security', 'Sessions', 'Audit Log' (highlighted), and 'Exception Log'. A filter section shows 'None (All events)' selected, with options for 'New Filter' and 'More...'. Below the filter is a date selection area with 'Select Date: 10/05/2023', '# Days to Include: 1', and a search box. The main content area is titled 'Audit Log' and includes pagination controls (1-4) and a 'Page size: 10' dropdown. A table displays the audit log entries with columns for 'Category (Task)', 'Date/User', and 'Description'.

Category (Task)	Date/User	Description
Document Configuration (07314841)	10/05/2023 Thu, 05:46 PM User: [redacted] Technical ID: 95122 (0)	Set CommPlan Document Template Properties: Lifecycle Stage (Active => Retire
Document Configuration (07314841)	10/05/2023 Thu, 05:45 PM User: [redacted] Technical ID: 95121 (0)	Set CommPlan Document Template Properties: Lifecycle Stage (Retired => Activ
Standard Reports	10/05/2023 Thu, 02:49 PM User: [redacted] Technical ID: 95120 (0)	Viewed list report: PowerSchool PA State Reporting (S_PA_STU_X)
Profiles	10/05/2023 Thu, 01:27 PM User: [redacted] Technical ID: 95119 (233)	Replaced field PowerSchoolID=16548 for Student: amanda test2 (16548)


Audit Logs list end-user events like:


- Viewing and editing student profiles (and other types of profiles).
- Viewing, editing, signing, and printing documents.
- Document setup and status changes are audited as well.
- Accessing reports and modifying report definitions.
- Changes to security roles and permissions.
- Changes to system configuration.





Can audit for individual users.


# Staff Security Settings


 **Special Programs**


 Search

 Curriculum

 Assessment

 Communication

 Reporting

 Administration

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### Staff Security Settings

**Staff Privileges**


☒ Allow individual and group privileges  
☐ Allow group privileges only (simplifies managing security)

**"Lock Out" Settings**

Allow how many incorrect password attempts before staff is locked out?  (2-9, 4 recommended)

☒ Allow users to reset their own forgotten passwords *(requires approved/validated email address)*

**Password Complexity Requirements**


Minimum Password Size:  

*NOTE: Passwords will be required to have at least one upper and lower case character, a numeric character and a punctuation character.*


**Password Expiration**


Number of Days Until Temporary Passwords Expire:  (optional)

Number of Days Until Personal Passwords Expire:  (optional)

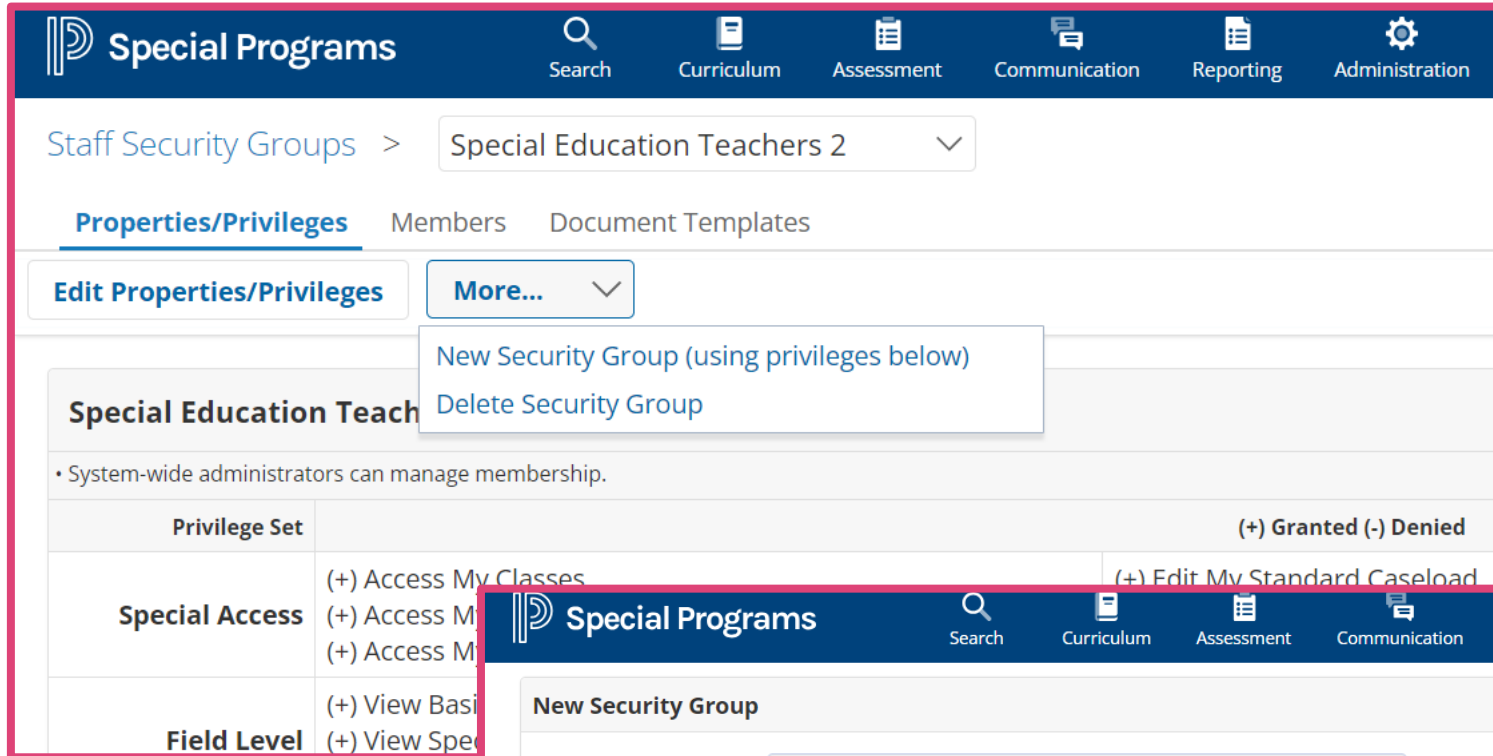
Number of Months to Prevent User from Reusing Passwords:  

**Session Timeout Minutes**  (Recommended: 45 Minutes)

**External SSO Staff ID Field**  

**OpenID Connect SSO Staff ID Field**  

# Add a New Security Group: Copy Existing Group



Special Programs

Search Curriculum Assessment Communication Reporting Administration

Staff Security Groups > Special Education Teachers 2

Properties/Privileges Members Document Templates

Edit Properties/Privileges More...

New Security Group (using privileges below)  
Delete Security Group

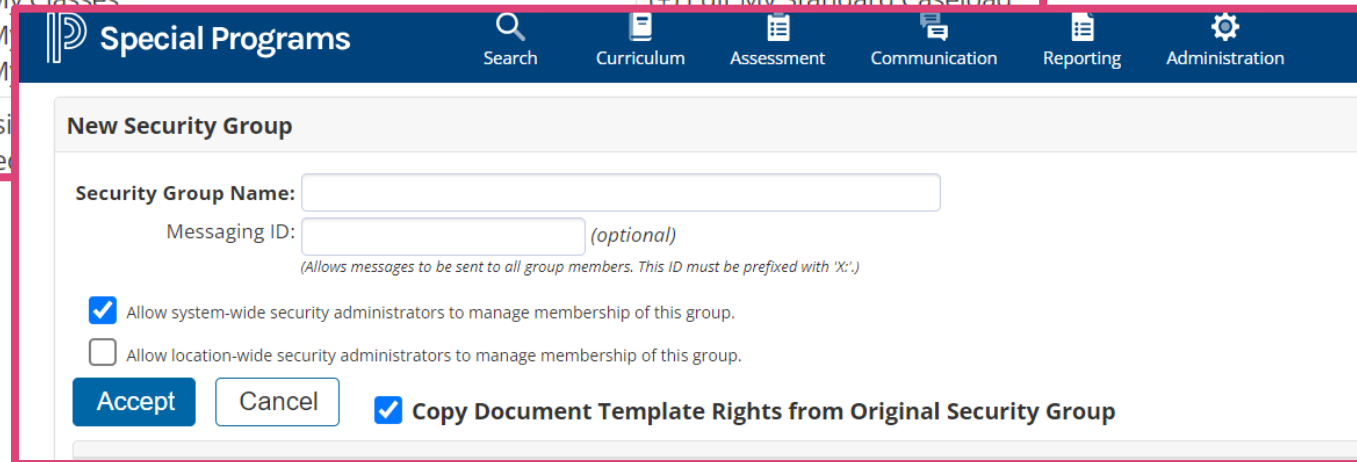
Special Education Teach

• System-wide administrators can manage membership.

Privilege Set	(+) Granted (-) Denied
Special Access	(+) Access My Classes (+) Access M (+) Access M
Field Level	(+) View Bas (+) View Spe



- More efficient approach.
- Choose this method if only slight modifications are needed from what already exists.



Special Programs

Search Curriculum Assessment Communication Reporting Administration

New Security Group

Security Group Name:

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

# Add a New Security Group



**Special Programs** Search Curriculum Assessment Communication Reporting Administration

### Edit Properties/Privileges

**Security Group Name:**

**Category:** (None) ▼

**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**

Student Profiles & Documents Privileges		
View Students	Grant (+) System-Wide	▼
Add Students	n/a	▼
Edit Students	n/a	▼
Delete Students	n/a	▼
Deactivate	n/a	▼
Reactivate	n/a	▼
Use Data Utilities: Students	n/a	▼
Access Documents	Grant (+) System-Wide	▼
Access Events	Grant (+) System-Wide	▼
Create Edit Template Documents	Grant (+) System-Wide	▼
Translate Template Documents	n/a	▼

When adding a NEW security group:

- **To grant system-wide access,** select **Allow system-wide** security administrators to manage membership of this group.
- **To grant access location-wide,** select **Allow location-wide** security administrators to manage membership of this group.
- **Assign Properties and Privileges** as required for the new group for each section as dictated by your district business practices.



# Planning for Security Groups

Security Groups	Questions to consider:
<ul style="list-style-type: none"><li>• Special Programs Admin</li><li>• Special Education</li><li>• Gifted and Talented</li><li>• Section 504</li><li>• Response to Intervention</li><li>• English Learners</li><li>• Building Staff</li><li>• Translators</li><li>• Speech</li><li>• OT/PT</li><li>• Audiological</li></ul>	<ul style="list-style-type: none"><li>• What is their role in relation to Special Programs?</li><li>• What is their purpose?</li><li>• Will they need to be a member of more than one Security group?</li><li>• Will they need location or system wide access?</li><li>• What documents will the group need to interact with?</li><li>• What access privileges are needed?</li><li>• Which access do they need: Read or Write access?</li><li>• What type of access for Instructional personnel?</li><li>• What type of access for Special Education personnel?</li></ul>



Use these considerations when setting up new security groups or reviewing existing groups.

# Profile Security

The screenshot displays the PowerSchool Special Programs interface. On the left, a sidebar titled 'Profile Types' lists various categories: Classes, Classes->ClassGeneralEdRoster, Classes->ClassStaffRoster, Classes->ClassStudentRoster, Districts, GeneralEdStudents, Globals, Locations, Staff, Staff->AlternateStaffLocations, and Staff->Caseload. The main content area shows the 'Classes' profile selected, with tabs for 'Properties', 'Verify All', and 'More...'. Below these, there are tabs for 'Output Format' (HTML Format, Testing Format, Section Properties, Fields, D) and a 'Security' tab. A 'Form Section Security For Students: Demographics/Enrollment/Contact Info' dialog box is open, showing a list of security groups that can access this section. The 'All Security Groups' checkbox is checked, and a list of groups is displayed, including '01', 'Admin rev\_acknowledge', 'Building Admin', 'Customer Ed Training', 'Dara's Group', 'DocuSign Senders', 'FACILITATORS', 'General Ed Teacher', 'IPT Security Group', 'PA End User Training', 'RA\_Training Group', 'RELATED SERVICES', 'Report Editing', 'Secretaries', 'Soapy Group', 'Special Education Administrators', 'Special Education Teachers', 'Special Education Teachers 2', 'Special Education Teachers 3', 'Teachers', 'Test 001', 'Test Security Group', 'test\_case\_manager', 'TestGroup1 - manage caseloads', 'TestGroup2', 'Translators', and 'User to Review\_Ack'. The 'Accept' button is highlighted.

**Profile Types**

Name
Classes
Classes->ClassGeneralEdRoster
Classes->ClassStaffRoster
Classes->ClassStudentRoster
Districts
GeneralEdStudents
Globals
Locations
Staff
Staff->AlternateStaffLocations
Staff->Caseload

**Special Programs**

Profile Types > Classes

Setup: **Properties** **Verify All** **More...**

Main ▾

**Output Format** HTML Format Testing Format Section Properties Fields D

**Edit Section...** **Print**

**Security**

**Form Section Security For Students: Demographics/Enrollment/Contact Info**

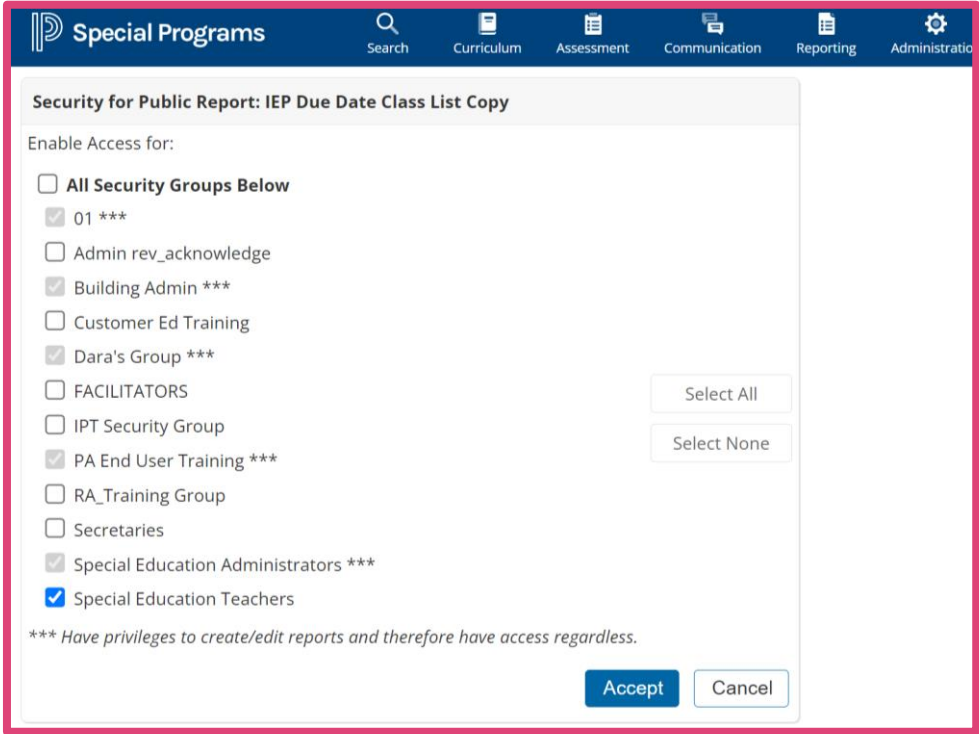
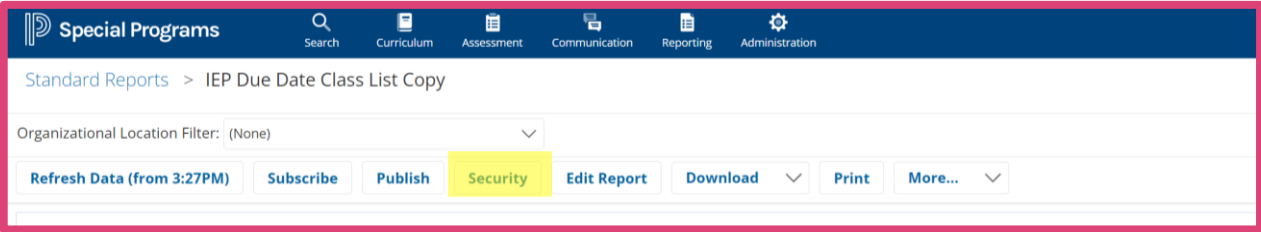
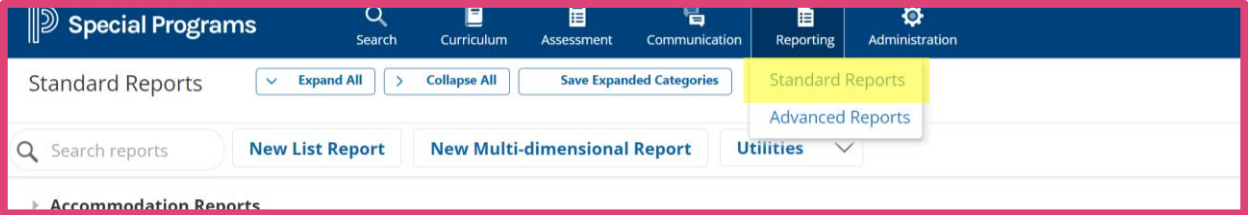
Security groups that can access this section ☒ **All Security Groups**

<input type="checkbox"/> 01	<input type="checkbox"/> Soapy Group
<input type="checkbox"/> Admin rev_acknowledge	<input type="checkbox"/> Special Education Administrators
<input type="checkbox"/> Building Admin	<input type="checkbox"/> Special Education Teachers
<input type="checkbox"/> Customer Ed Training	<input type="checkbox"/> Special Education Teachers 2
<input type="checkbox"/> Dara's Group	<input type="checkbox"/> Special Education Teachers 3
<input type="checkbox"/> DocuSign Senders	<input type="checkbox"/> Teachers
<input type="checkbox"/> FACILITATORS	<input type="checkbox"/> Test 001
<input type="checkbox"/> General Ed Teacher	<input type="checkbox"/> Test Security Group
<input type="checkbox"/> IPT Security Group	<input type="checkbox"/> test_case_manager
<input type="checkbox"/> PA End User Training	<input type="checkbox"/> TestGroup1 - manage caseloads
<input type="checkbox"/> RA_Training Group	<input type="checkbox"/> TestGroup2
<input type="checkbox"/> RELATED SERVICES	<input type="checkbox"/> Translators
<input type="checkbox"/> Report Editing	<input type="checkbox"/> User to Review_Ack
<input type="checkbox"/> Secretaries	

**Accept** **Cancel**

Administration > Configuration > Profile Types > Select Profile > Select Edit Section > Security

# Reporting Security



Reporting > Standard Reports > Select Report > Security

# Special Programs 2023 PowerUp Events and Office Hours

**October 18:** *Office Hours*

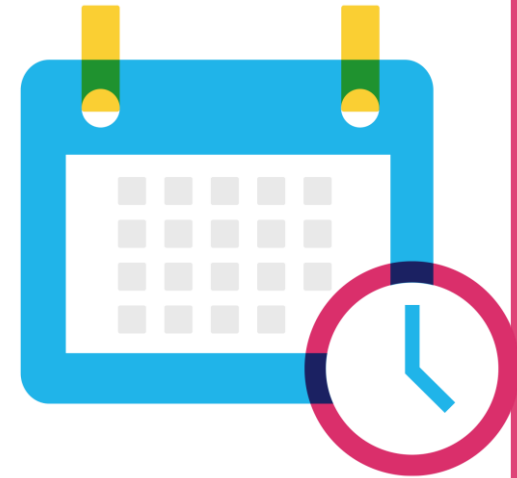
Topic: *Security*

**November 14:** *Special Programs PowerUp*

**November 15 :** *Office Hours*

Topic: *Utilities/Transfer Envelopes*

***December: No PowerUp or Office Hours***



# Please Share Your Feedback!

- You will be asked to take a **short survey** when leaving the Zoom Meeting
- Help us help you – We value **your feedback** and use it to create future sessions





# Need more training? Get involved with Customer Education!



**PowerSchool University** | [www.powerschooluniversity.com](http://www.powerschooluniversity.com)

Attend onsite and online training events for hands-on professional development covering multiple PowerSchool solutions led by certified PowerSchool Trainers



**Exclusive Training Events** | [training@powerschool.com](mailto:training@powerschool.com)

Exclusive events can be scheduled at your location and offered only to staff in your District



**Professional Development Plus** | [pdplus@powerschool.com](mailto:pdplus@powerschool.com)

On-demand training library featuring engaging formats, personalized learning, and progress monitoring



**Certifications** | [training@powerschool.com](mailto:training@powerschool.com)

We offer a variety of train-the-trainer, end user, and role-based certifications so you can become a certified PowerSchool expert



**Proven Practices** | [provenpractices@powerschool.com](mailto:provenpractices@powerschool.com)

PowerSchool experts guide your staff development to prepare your teachers and administrators to achieve success and drive improvement



# Become a PowerSchool Champion!

PowerSchool Champions connect, share and learn with others in solution-specific communities. We share our expertise as teachers, administrators, technology directors, or talent leaders. We engage in interesting activities to accumulate points, collect badges, and earn fantastic rewards. Joining the Champions community provides:

- **Community** • Join an exclusive group of school and district leaders
- **Engagement** • Share your expertise and give product feedback
- **Opportunity** • Earn rewards like swag, cool opportunities, event attendance, and more
- **Growth** • Advance professionally, build your PLN and increase your Ambassador Program eligibility

Visit [powerschool.com/champions](https://powerschool.com/champions) and SIGN UP or email [champions@powerschool.com](mailto:champions@powerschool.com) if you have questions!



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**CHAMPIONS**



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# Thank you for your Partnership!

# Resources: General

PowerSchool Community	In-Platform User Help
<a href="#">PowerSchool Community</a>	<a href="#">Communications and Calendar</a>
<a href="#">Special Programs PowerUps 2023 Series Registration</a>	<a href="#">Review and Acknowledge</a>
<a href="#">Special Programs Office Hours 2023 Registration</a>	
<a href="#">PowerUp Events (All Products)</a>	
<a href="#">Technical Contacts</a>	
<a href="#">Contact Support</a>	
<a href="#">Case Portal Priority Definitions</a>	
<a href="#">Subscriptions and Notifications</a>	

# Resources: General

Special Programs Release Notes	Special Programs Release Notes	Special Programs PowerUps
<a href="#">Platform Release 22.11.0.0</a> Release date: December 16, 2022	<a href="#">Platform Release 23.6.0.0</a> Release Date June 16, 2023	<a href="#">Special Programs PowerUps 2022 Series</a>
<a href="#">Platform Release 22.11.1.0</a> Release date: January 27, 2023	<a href="#">Platform Release 23.6.1.0</a> Release Date: July 14, 2023	
<a href="#">Platform Release: 22.11.2.0</a> Release date: February 17, 2023		<b>Office Hours</b>
<a href="#">Platform Release: 22.11.3.0</a> Release date: March 17, 2023		<a href="#">Office Hours 2020 Series</a>
<a href="#">Platform Release: 22.11.4.0</a> Release Date: April 21, 2023		<a href="#">Office Hours 2020 Series</a>
<a href="#">Platform Release: 22.11.5.0</a> Release Date: May 19, 2023		<a href="#">Office Hours 2020 Series</a>

# Resources: Reporting

Reporting		
<a href="#">Office Hours   PowerSchool Special Programs - July 16, 2020</a>	<a href="#">Reporting main screen navigation basics</a>	<a href="#">Creating Reports When Using the "Review &amp; Acknowledge" Feature</a>
<a href="#">Office Hours Recording: Reports - June 24, 2021</a>	<a href="#">Report creation basics in Special Programs</a>	
<a href="#">Office Hours Recording: Reports - Part 2 - July 29, 2021</a>	<a href="#">Profile Reports in Special Programs</a>	
<a href="#">PowerSchool Special Programs PowerUp: Reporting January</a>	<a href="#">Creating Document Reports in Special Programs</a>	
<a href="#">Finding profile field names</a>	<a href="#">Editing Report columns</a>	
<a href="#">Finding Field and Template Names for Report Use</a>	<a href="#">Editing the report properties and selection formula</a>	
<a href="#">How to sort a report</a>	<a href="#">Working With Date Fields in the Report Selection Criteria Formula</a>	

# Resources: Digital Signature

Community Links	Previous Office Hours Recording	In Platform User Guide
<a href="#">How-To: Configure Digital Signature</a>	<a href="#">Office Hours: Digital Signature- June 30, 2022</a>	<a href="#">Digital Signature</a> Special Programs User
<a href="#">How-To: List Statuses for Digital Signature Configured Documents</a>		<a href="#">Manage Signature Requests</a> Special Programs User
<a href="#">How-To: Opt-Out of Digital Signature</a>		<a href="#">Digital Signature</a> Special Programs System Administrator
<a href="#">How-To: Configure Notification Email for Digital Signature</a>		
<a href="#">How-To: Check Digital Signature Status of Students</a>		
<a href="#">How-To: List Statuses for Digital Signature Configured Document Templates</a>		

# Resources: Language Translations

Community Links	Previous Office Hours Recording	Previous Power Ups Recording	In-Platform User Guide
<a href="#">How-To: Document Translations- Translating a Document Template</a>	<a href="#">Translations- June 2020</a>	<a href="#">Translations August 9, 2022</a>	<a href="#">Special Programs- System Administrator: Configure Security for Language Translators</a>
<a href="#">How-To: Document Translations - Maintaining Translated Documents</a>	<a href="#">Translations- August 2022</a>		<a href="#">Special Programs User: Document Language Translation</a>
<a href="#">How-To: Document Translations - Keyword Table Setup</a>			
<a href="#">How-To: Document Translations - Staff Security Setup</a>			
<a href="#">How-To: Localize Standard Reports</a>			

# Resources: Integrations

Community Links: Special Programs/SIS	Community Links: Special Programs/SIS	Community Links: Special Programs/SIS	Previous Office Hours Recording	Previous Power Ups Recording	In-Platform User Guide
<a href="#">How-To: Special Programs/PS SIS Integrations 101</a>	<a href="#">How-To: Special Programs/PS SIS Integrations 107</a>	<a href="#">How-To: Special Programs / PS SIS Integration 113</a>	<a href="#">PowerSchool Special Programs - Aug 27, 2020</a>	<a href="#">Integrations- March 2022</a>	<a href="#">PowerSchool SIS Integration</a>
<a href="#">How-To: Special Programs/PS SIS Integrations 102</a>	<a href="#">How-To: Special Programs/PS SIS Integrations 108</a>		<a href="#">Integrations and Dataflow - Part 1 March 31, 2022</a>		<a href="#">Schoology Integration</a>
<a href="#">How-To: Special Programs/PS SIS Integrations 103</a>	<a href="#">How-To: Special Programs/PS SIS Integrations 109</a>		<a href="#">Integration and Dataflow - Part 2 - April 28, 2022</a>		
<a href="#">How-To: Special Programs/PS SIS Integrations 104</a>	<a href="#">How-To: Special Programs/PS SIS Integrations 110</a>				
<a href="#">How-To: Special Programs/PS SIS Integrations 105</a>	<a href="#">How-To: Special Programs/PS SIS Integrations 111</a>				
<a href="#">How-To: Special Programs/PS SIS Integrations 106</a>	<a href="#">How-To: Special Programs/PS SIS Integrations 112</a>				

# Resources: End of Year Rollover

Previous Office Hours Recordings	Previous PowerUps Recordings	In-Platform User Guide
<a href="#"><u>Office Hours Recording: End of Year Rollover, and Ideas Portal - May 2022</u></a>	<a href="#"><u>PowerUps Recording: End of Year Rollover - May 2022</u></a>	<a href="#"><u>End-of-Year Rollover</u></a>



# Resources: Document Templates

Previous Office Hours Recordings	Community Articles	In-Platform User Guide
<a href="#"><u>Document / Field Dataflow</u></a>	<a href="#"><u>How To Use Easy Edit (Community article)</u></a>	<a href="#"><u>Document Templates Tab Overview</u></a>
<a href="#"><u>Templates and Easy Edits</u></a>	<a href="#"><u>How-To: Set / Edit Field Properties for Self-Hosted Database in Special Programs</u></a>	<a href="#"><u>Document Template Tab: Setup Menu-Security</u></a>
	<a href="#"><u>Q&amp;A: Easy Edit - What Fields Can I Add to My Document?</u></a>	<a href="#"><u>Override Document Template Behavior Options</u></a>
	<a href="#"><u>Q&amp;A: Easy Edit- Handling Customizations along with the Model Updates</u></a>	<a href="#"><u>Override Document Template Field Properties</u></a>
	<a href="#"><u>How-To: Editing Globals Profile Values (District Info, First/Last Day of School, Etc.)</u></a>	<a href="#"><u>Review and Acknowledge Feature (System Admin Help)</u></a> <a href="#"><u>Review and Acknowledge Documents (User Help)</u></a>
	<a href="#"><u>How-To: Edit Document Template Security Permissions</u></a>	<a href="#"><u>Easy Edit</u></a>
	<a href="#"><u>How-To: Configuring Other and Alternate Document Template Security Rights in Special Programs</u></a>	

# Resources: Profiles, Workflow Cases and Keyword Tables

Previous Office Hours Recordings	In-Platform User Guide
<a href="#">Office Hours Recording: Profiles - May 27, 2021</a>	<a href="#">Profiles and Data (System Administrator)</a>
	<a href="#">View Keyword Tables (System Administrator)</a>
	<a href="#">Edit Keyword Tables (System Administrator)</a>
	<b>Workflow Case Management</b> <a href="#">Show Workflow Case Status</a> <a href="#">Set Up Workflow Case Types</a> <a href="#">Workflow Case Type Planning Tool</a> <a href="#">User Options for Workflow Case Management</a> <a href="#">Create a New Workflow Case</a> <a href="#">Manage Workflow Cases</a> <a href="#">Manage Documents Within a Workflow Case</a>
	<a href="#">Access Student Profiles, Documents, and Events</a>

# Resources: Security

Previous Office Hours Recordings	Community Articles	In-Platform User Help
<a href="#">Office Hours Recording: Security Configurations - September 29, 2022</a>	<a href="#">How-To: Edit Document Template Security Permissions</a>	<a href="#">Security</a> (Administrator Help)
	<a href="#">How-To: Configuring Document Template Security Rights in Special Programs</a>	
	<a href="#">How-To: Add a Staff Member to a Security Group</a>	
	<a href="#">How-To: Document Translations - Staff Security Setup</a>	
	<a href="#">How-To: Setting User or Security Group to Receive Student Transfer Envelope In Student Utilities</a>	
	<a href="#">How-To: File Attachment Security</a>	
	<a href="#">How-To: Enable Access for a Report to Multiple Security Groups</a>	