



PowerUPs

Enrollment: Permissions & Profiles

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Agenda

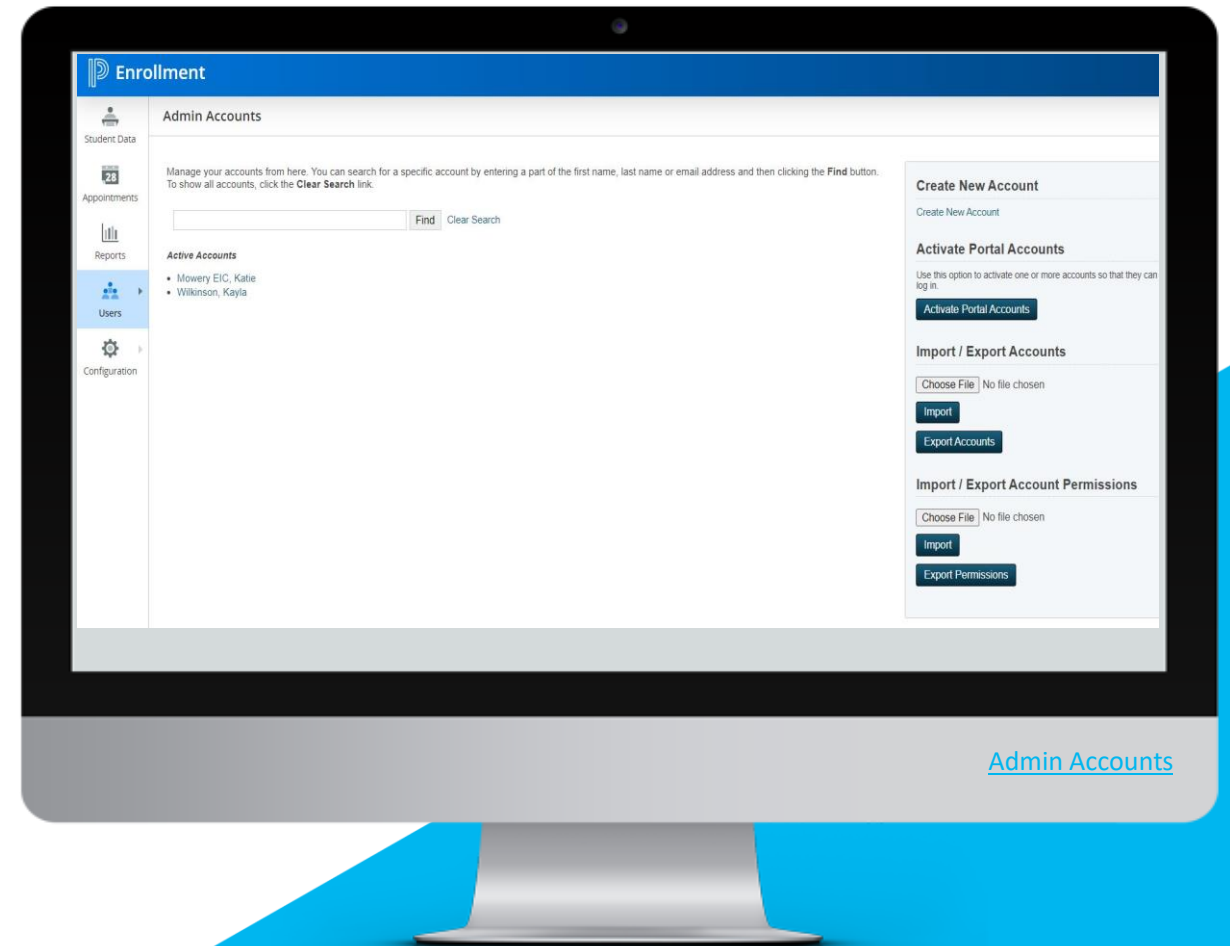
1	Where to Access Accounts & Permissions
2	Admin Accounts
3	Permissions
4	How to
5	Resources
6	Q&A
7	Upcoming Events & Webinars



Where to Access Admin Accounts & Permissions

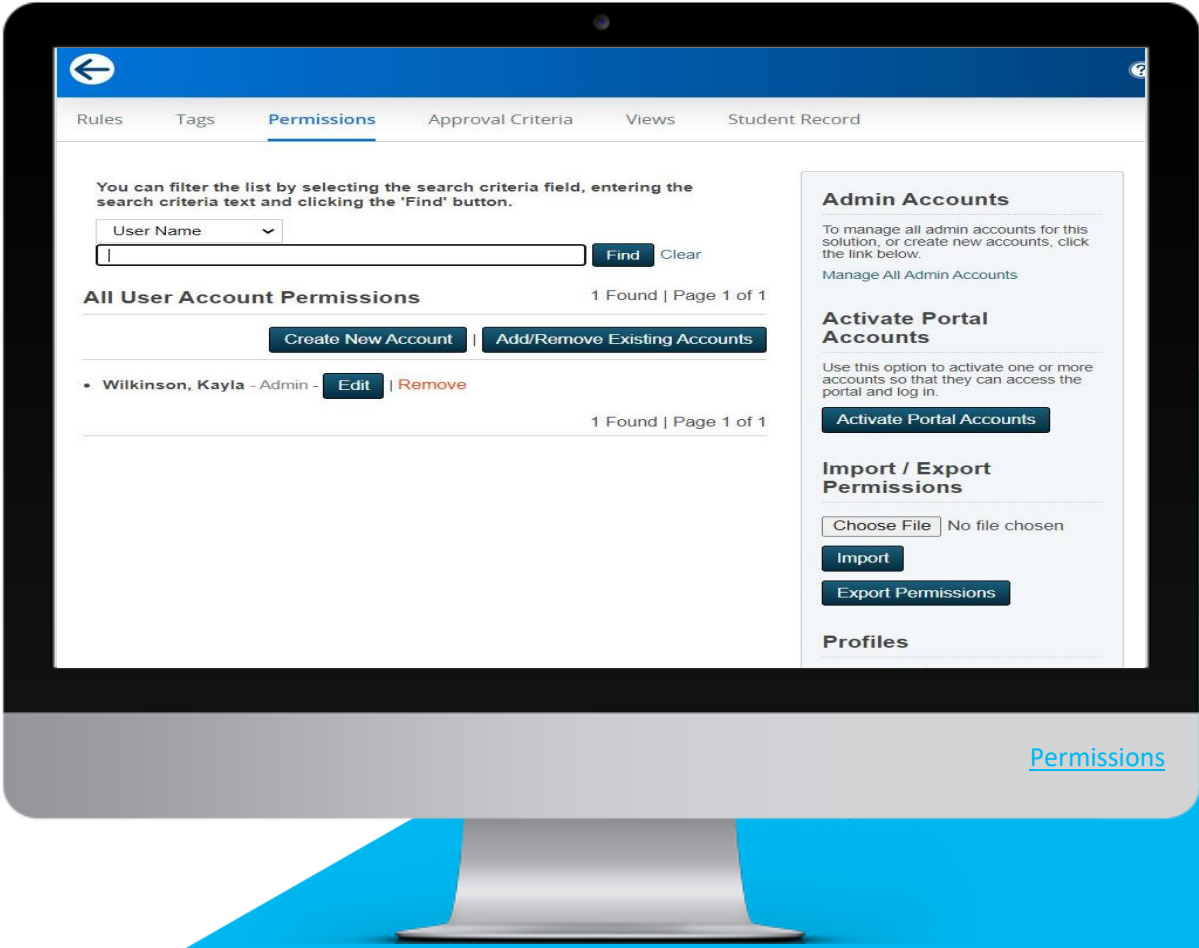
Admin Accounts

Users > Admin Accounts



Permissions

Configuration > General > Choose Form > Permissions





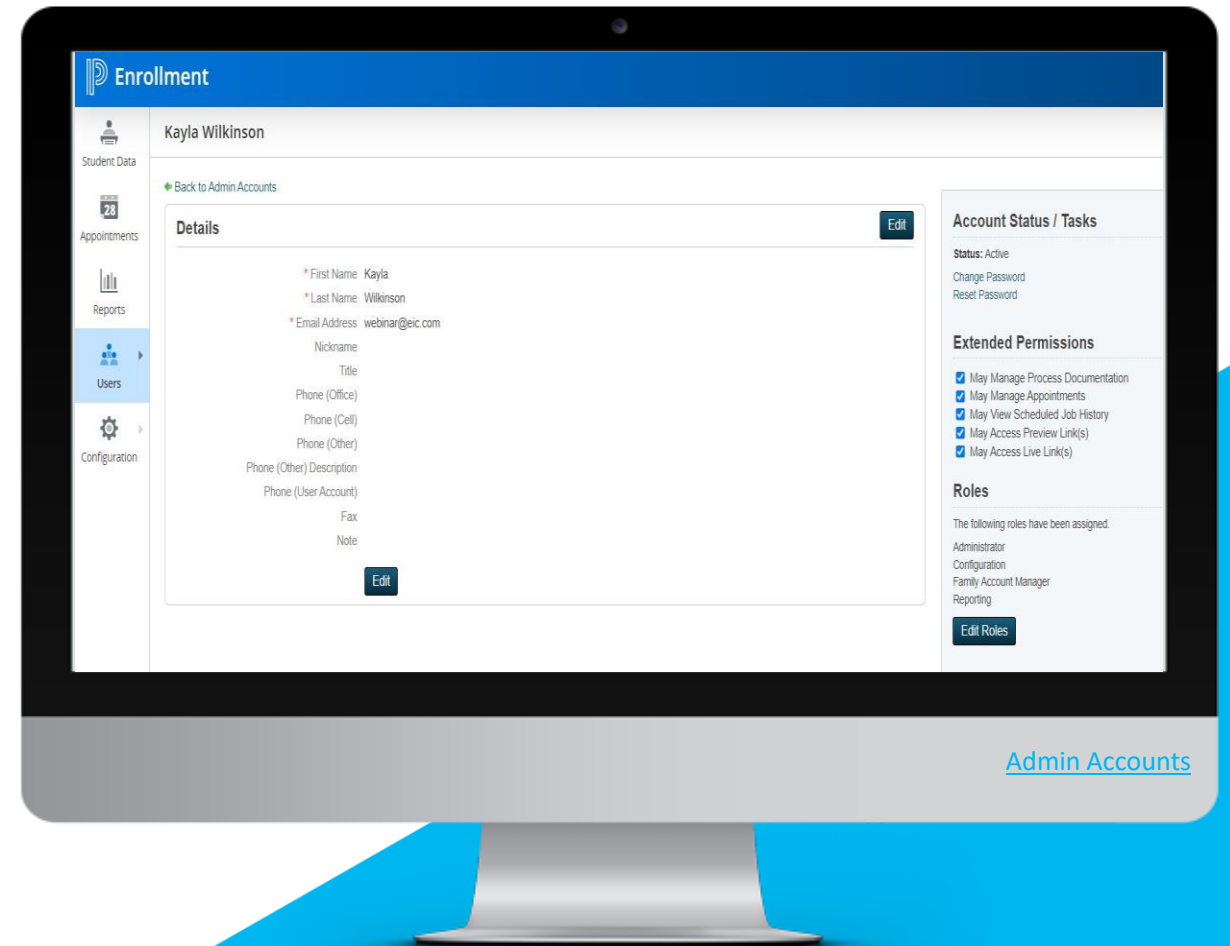
Admin Accounts

Admin Accounts

Review Accounts	<ul style="list-style-type: none">• Active, Pending, Disabled
Create New Account	<ul style="list-style-type: none">• Only gives access to the portal not the forms
Activate Portal Accounts	<ul style="list-style-type: none">• Sends instructions to users selected
Import/Export Accounts	<ul style="list-style-type: none">• Details Sections
Import/Export Account Permissions	<ul style="list-style-type: none">• Permissions Section

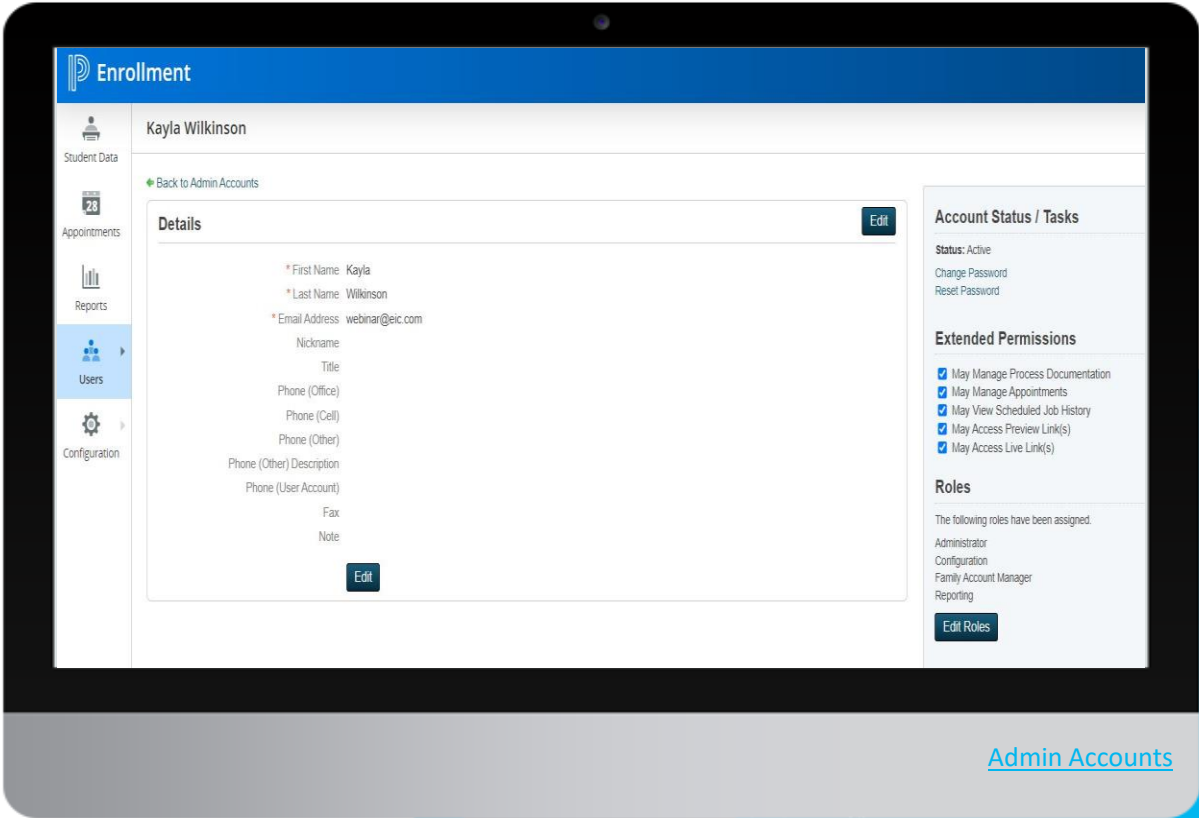
Account Details

- General Details
 - Name
 - Email
 - Nickname
 - Title
 - Phone Numbers
 - Fax
 - Notes



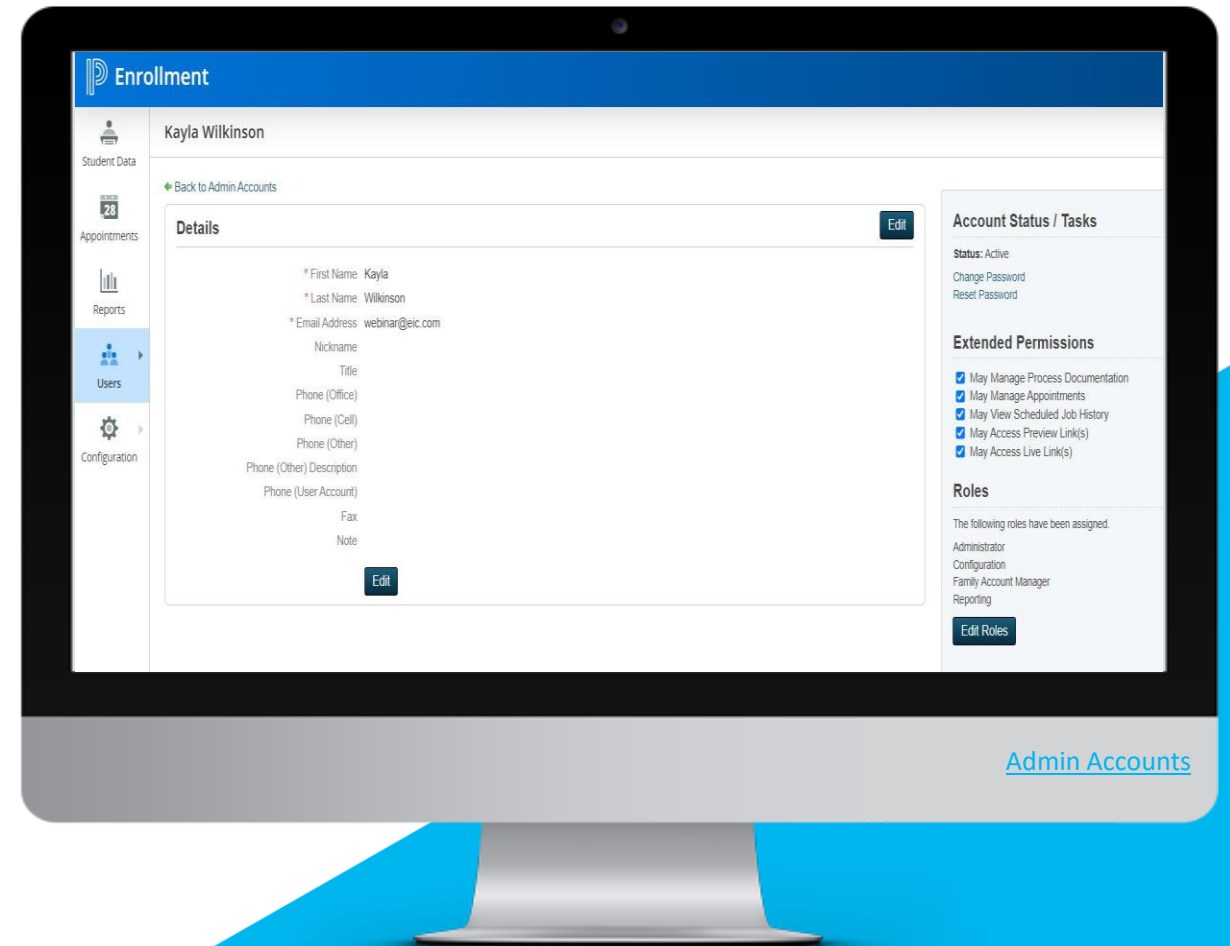
Account Details

- Change Password
- Reset Password
- Disable Accounts



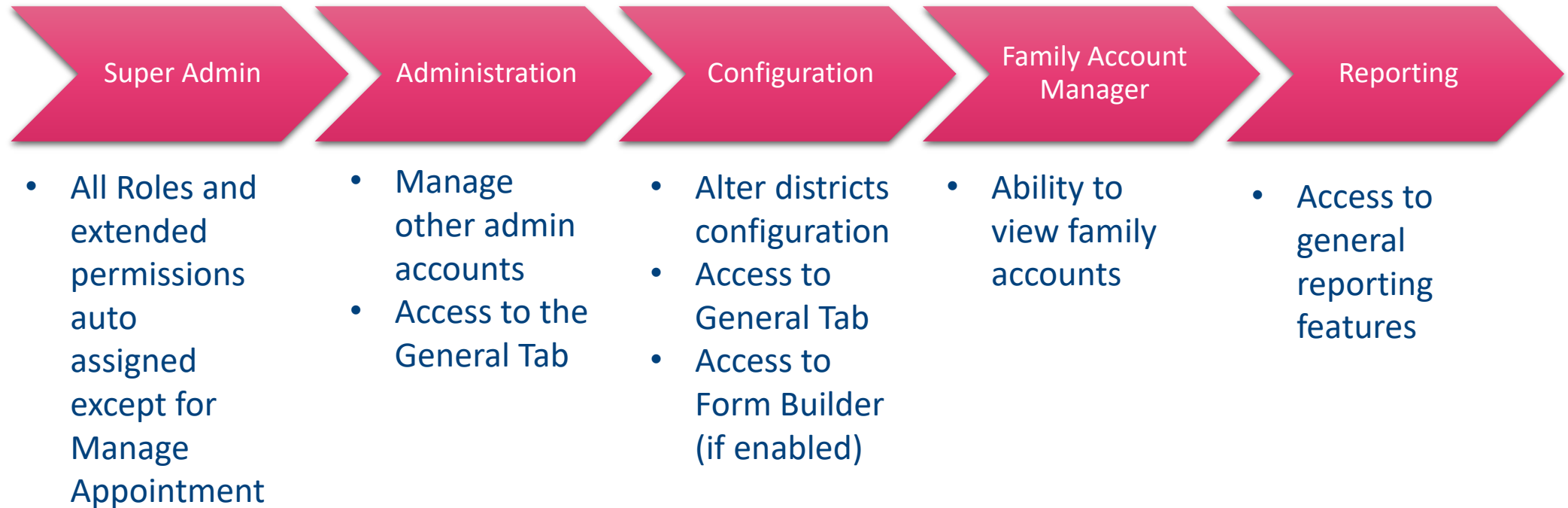
Account Details

- Extended Permissions
 - Manage Process Documentation
 - Manage Appointments
 - View Scheduled Job History
 - Access Preview Link(s)
 - Access Live Link(s)



Admin Accounts Roles

*Only PS Can Assign





Permissions

Permissions

Search Accounts

- By Username, Profile Name, Workspace Filter

Create New Account

- Need to go to Admin Accounts to add Role/Additional Permissions

Add/Remove Existing Accounts

- Give/Takeaway the ability to access the form

Edit Account Permissions

- Edit/Assign a profile/permission rules to admins account for that form

Permissions

Manage All Admin Accounts

- Takes you to the general account page

Activate Portal Accounts

- Will send email to non-active account with instructions to activate

Import/Export Permissions

- Show admins as well as their profiles/rules

Profiles

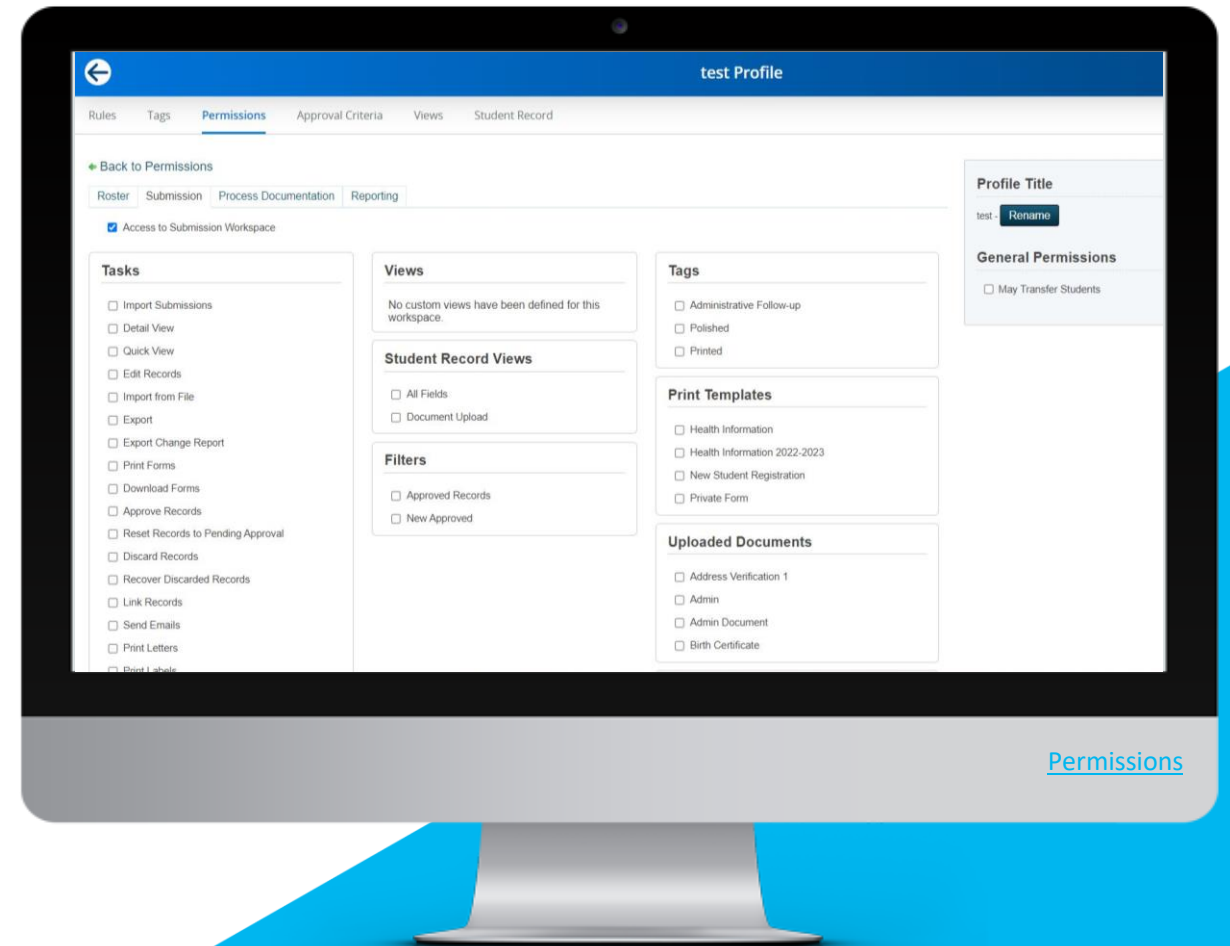
- Set of permissions you can assigned to admins

Import/Export Profiles

- Ability to see all profiles and what is included/not included in each

Profiles

- Tabs will change depending on the form you are in
- Profiles are a way to group like admins together





How To

How To

01

Creating a New Admin Account

02

Adding/Removing Admin Accounts to a form

03

Creating a New Profile



Admin Notifications

Admin Notifications Options

*Only PS Specialists can set these up

You can have emails go to specific staff based on these 3 actions



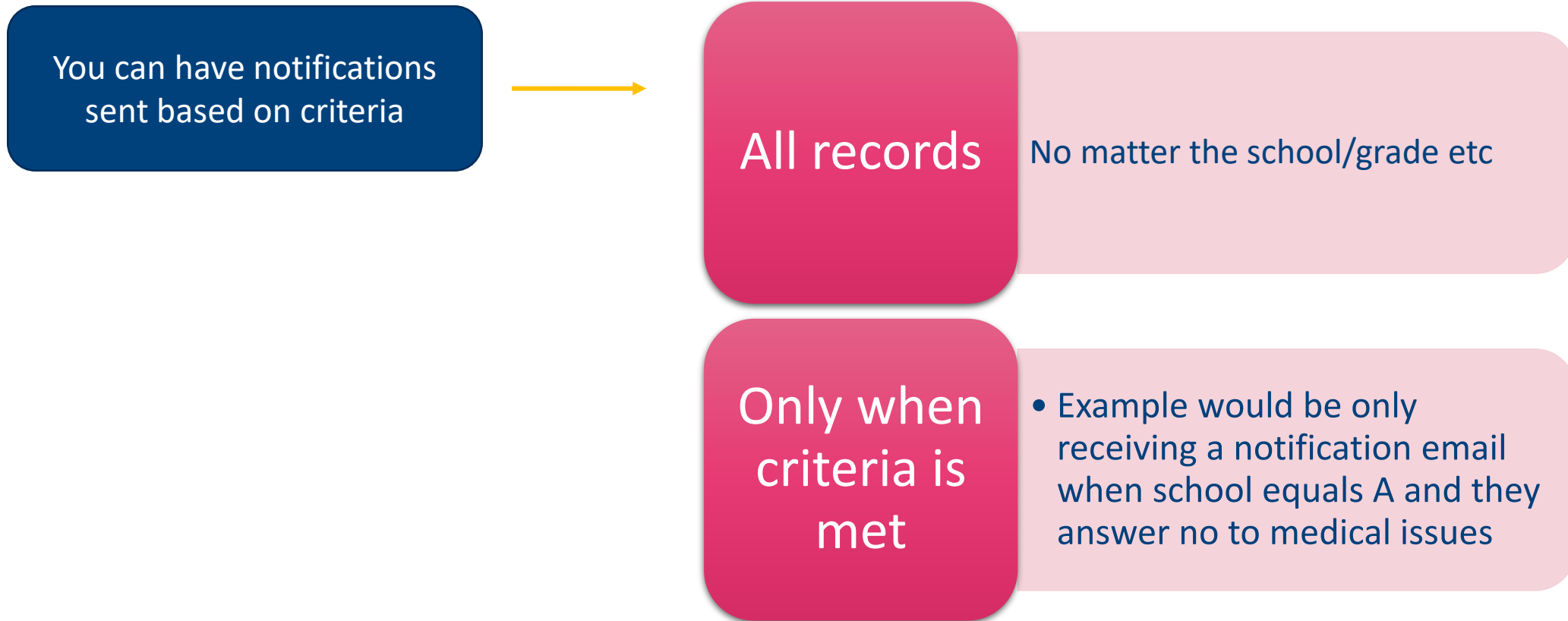
Submission Notification

Approval Notifications

Delivery Notification

Admin Notifications Logic

*Only PS Specialists can set these up



How to Submit a Request to Support

*Only PS Specialists can set these up

“I would like to set up the following admin notifications;

Staff A, B and C receive a submission notification for when a record is submitted for school A
Staff D and E receive a approval notification when a record is approved and say yes to medical issues

Staff F, G, and H receive a delivery notification for all records”

Admin Notification Email

*Only PS Specialists can set these up

- You can have 3 notification emails set up one for submission notifications, approval notifications and delivery notifications.
- Just let PS support know what you want included in each
 - You can include info from the submitted record (see example below)

Example Submission Notification Email

*is*Action:Title*is* has been submitted
for *is*FamilyMember:FirstName*is* *is*FamilyMember:LastNam
e*is* on *is*Submission:DateSubmitted*is*

Grade: *is*stu_EnrollGrade*is*
School: *is*stu_School*is*



Resources

Help Guide & Community

Resources

Help Guide	Community
Admin Accounts	Self-Service Capability Matrix
Permissions	
Profiles	
Workspace Rules	



Questions

Upcoming Events & Webinars

Upcoming Events

Enrollment Admin Office Hours

Wednesdays @ 11am ET / 8am PT

<https://help.powerschool.com/t5/PowerSchool-Enrollment/Join-us-for-Enrollment-Office-Hours/ta-p/132352> *Recordings found here

Enrollment Basics Webinar Series

2nd and 3rd Monday of the Month @ 11am ET / 8am PT

<https://help.powerschool.com/t5/Enrollment-Administrator-Forum/Register-Now-for-Enrollment-Signature-Basics-Webinar-Series/m-p/304392#M766>

Upcoming Webinars

<https://help.powerschool.com/t5/Enrollment-Admin-Forum/Enrollment-Webinar-Series-2022/m-p/268719#M694>

Parent Experience/Troubleshooting - Session will consist of a walkthrough of a form from the parent's perspective. It will also cover troubleshooting techniques

May 12

Views – We will walk through how you can utilize different views as well as how you can create your own views using self-service

June 9

Tags – This session we will walk through how you can create your own tags as well as utilize them in your day to day

July 7

