



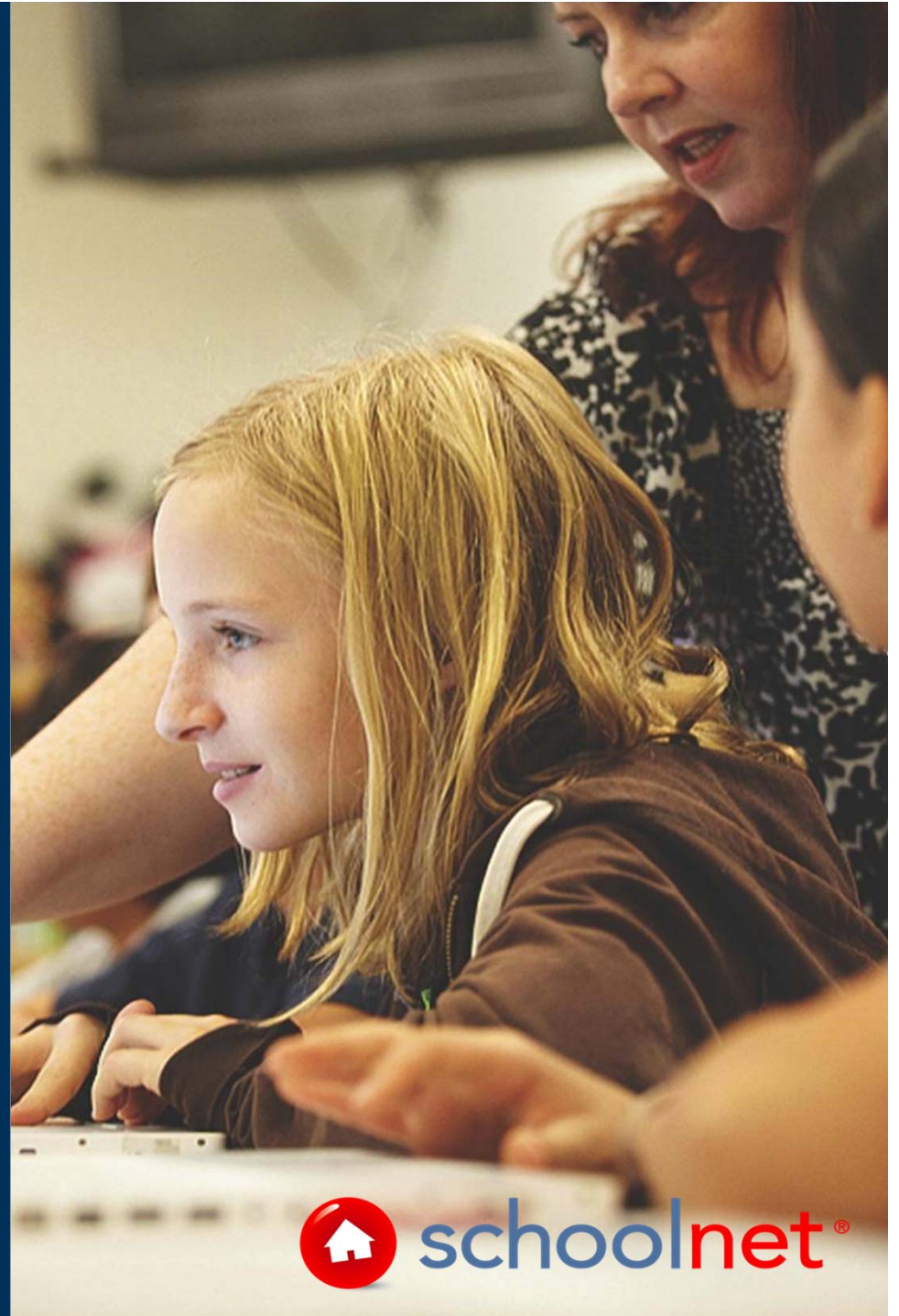
Pearson

Schoolnet User Management

March 2016

Milestones Session

January, 2016



Topics

- How user roles and operations impact who can do what
- Granting special permissions to a subset of users
- Other things that impact what a user can see and do
- PowerSchool User Management

User Entitlement

Factors that impact what a user can see and do:

- Institution (district or school)
- Role (teacher, staff, student, etc.)
- Operation (Manage Instruction, Schedule Tests, etc.)
- Association between teachers, sections and students in the data
 - Either pulled from SIS or override from section request feature
- Tab permissioning
- Hosting configurations

Terminology: Institution

- Each user is assigned to a default institution (i.e., school)
- Roles and their associated operations are granted per institution: if you have the View Basic Student information operation at your school you can only see student basic information for all students at that school
- Users may be assigned to multiple institutions (e.g., for a specialist who teaches at two schools)

Terminology: Role

- Users have a default system role (Teacher, Leadership, Staff, Student, etc.)
- Can have additional system and/or custom roles
- Roles exist as collections of permissions that can be granted to a user within the scope of a specific institution
- Additional custom roles may be created to give a subset of users specialized permissions

System Roles

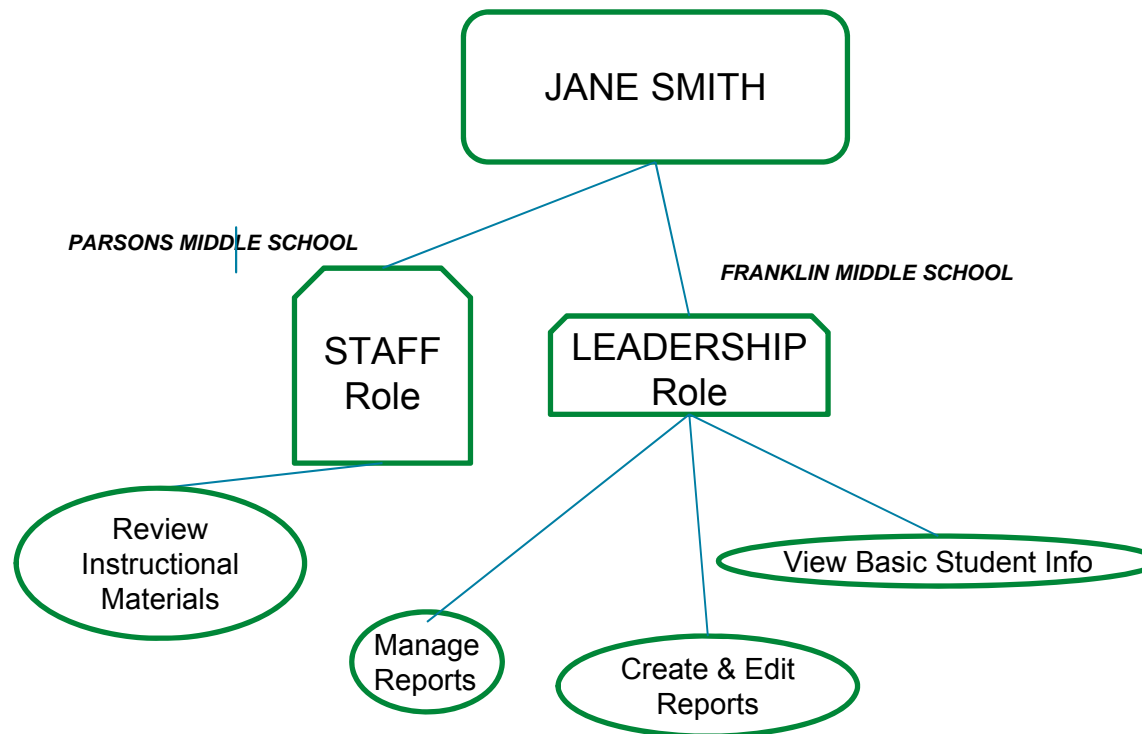
| | |
|-------------------------|--|
| System Operator | A person responsible for overseeing and administering Schoolnet applications and their users. |
| Teacher | A person who is assigned to at least one section of students as the primary teacher. |
| Leadership | A person who has administrative duties at the institution level. |
| Staff | A person who is not a member of other user roles (e.g. Teacher, Parent) and who is employed by the school district and typically has an instructional role. |
| Employee | A person who is not a member of other user roles (e.g. Teacher, Parent) and who is employed by the school district and does not have a typically instructional role. |
| Parent | A parent or legal guardian of a student enrolled at the school district. |
| Student | A student. |
| Guest | A person who is not in any other role listed above but still needs to log in to the Schoolnet application. |
| Test Item Administrator | Assigned to provide district level users access to test items. This is not needed for school level users. Not available as a default role. |

Terminology: Operation

- Operations are used to grant special site capabilities, such as publishing reports or approving test items
- Operations are assigned to roles
- Users get the rights granted to an operation by being in at least one role associated with the operation
- Operations assigned to a role are universal across the site (can't have Leadership role set up differently for different schools)

Operation Assignment

Users are granted operations by way of role assignments; operations cannot be individually assigned to users.




- At Franklin, Jane can see all student profiles and publish reports
- At Parsons, she can't see students, but can review lesson plans

Institution Hierarchy

- Rights assigned at a parent institution (e.g., district) trickle down to child institutions (e.g., school) *
 - *Some operations do not apply to all levels; e.g., manage curriculum, manage roles
- Many implications – student viewing (if you can do it at the district you can do it for every school below), classroom viewing, report bank access, etc.

Terminology: Default

| Permissions | |
|---|--------------------|
|  Edit User Information and Permissions | |
| Default Institution: | WISE MIDDLE SCHOOL |
| Default Role: | Teacher |
| ROLE | |
| Teacher | |
| OPERATION | |
| View student contact information | |
| View student economic information | |
| Manage discussions | |

Each user gets one default **institution** and **role**:

- Default **Institution** determines data set on home page and material/item submit and approval level only
- Default **role** impacts My Schoolnet view (generally Teacher, Leadership, Staff, Student or Parent)

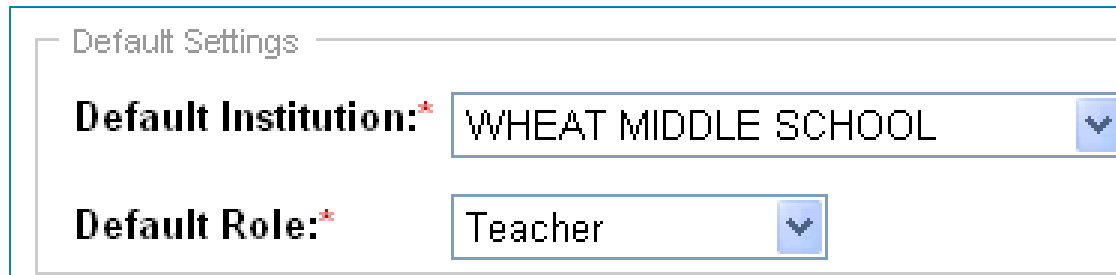
Self-Selection of Default Role/Institution

When in the same role at two institutions, you get all the same rights at both, except teachers can only submit items and lessons to their default school.

End users can set their own default role and institution in My Account (assuming enabled in System > General > Configure Link Displays). This change gives users more autonomy and control over the data they see and better accommodates teachers who teach at multiple institutions.

Main impacts:

- Default institution: submit and approve, default KPIs
- Default role: My Schoolnet View



Default Settings

Default Institution:* WHEAT MIDDLE SCHOOL

Default Role:* Teacher

Tab Visibility

- If a user is not in a role enabled for a tab, they will not have access to the module
- Must be a system operator to change tab visibility
- Can set by system and custom roles

System: General Settings



| | | | | | | | | | | | | | |
|------------|--------|--------------|-------------|-----------------|-----------|----------|------------|-----------------|--------|-------|--------|------------------------|----------|
| Contact Us | Design | Institutions | Tabs | Student Profile | Standards | Subjects | Score Type | Scheduled Tasks | Config | Cache | Mobile | Configure Link Display | API Mgmt |
|------------|--------|--------------|-------------|-----------------|-----------|----------|------------|-----------------|--------|-------|--------|------------------------|----------|

Configure access to each module based on the role membership of the user.

| | Tab Name | Description | Module |
|-------------------------------------|------------------------|----------------------------|--------------|
| <input checked="" type="checkbox"/> | My Schoolnet | Personalized content | My Schoolnet |
| <input checked="" type="checkbox"/> | Outreach | Collaboration | Outreach |
| <input checked="" type="checkbox"/> | School & District Data | Reports & Indicators | Account |
| <input checked="" type="checkbox"/> | Classrooms | Rosters, Reports, Planners | Align |
| <input checked="" type="checkbox"/> | Assessment Admin | Create & Monitor | Assess |
| <input type="checkbox"/> | Educator Development | Goals, Performance, PD | PD Planner |

Student Viewing Rights

There are four distinct student detail viewing operations. Access to lunch status, discipline data and contact information can be set by role.

| | |
|-------------------------------------|--|
| View basic student information | Name, DOB, Special Ed status, Gifted status |
| View student contact information | Enrollment School, Guardian, Phone |
| View student discipline information | Info in “Disciplinary Incidents” student profile tab |
| View student economic information | Typically lunch status, usually disable for most roles |

Teacher Student Viewing Rights

Teachers will inherently (with no operation assignment) be able to “View basic student information” for the students in their sections.

View basic student information

***Do not assign this operation to the Teacher role unless the intent is to allow teachers access to students across the entire school.

Assign any of these supplemental student viewing rights to “enhance” the information that any users see for the students they are allowed to view.

View student contact information

View student discipline information

View student economic information

The screenshot shows a configuration window for a user role named 'Teacher'. The 'Name' field is 'Teacher' and the 'Description' is 'A person employed by the school district to instruct students.' Below this, there are two columns: 'Available' and 'Included'. The 'Available' column contains a list of operations: 'View basic student informati', 'View student discipline infor', 'View student economic infor', 'Distribute user accounts', 'Manage user accounts', and 'Manage roles'. The 'Included' column contains 'View student contact informatio'. A green double-headed arrow points between the two columns, indicating the ability to move items between them.

Teacher Accounts

Important points:

- If a teacher should have extra permissions, add to their existing account rather than create a duplicate
- Wait for new teachers to appear through SIS rather than adding an account manually

School & District Data Permissioning

- 'View Published Reports' provides access to reports in the Report Bank. Teachers need in order to see the Student Analysis tab reports in Classrooms.
- 'Create and Edit Reports' permits users to create and save pre-formatted and custom reports
- 'Manage reports' lets users publish to their Report Bank
- 'View Teacher and Section Level Data' is required to build or view any reports that show performance by teacher
- Nobody needs the Analyze operations

In addition to applicable operations:

- There is a configuration available to prevent teachers from seeing students who are not in currently enrolled teacher sections (stricter interpretation of FERPA policy). Contact Support to have this enabled if desired.
- There is an option to allow users access to only the Report Bank for their own institution, but note that users will still be able to create aggregate reports for any school (setting in System > School & District Data > Saved Reports)

Classrooms Permissioning

- Teachers don't need any operations at all
- Principals need the 'Manage instruction' operation to see section level reports in the Classroom module as well as view teacher lesson planners
- Whoever will approve materials needs 'Review instructional materials'
- There is an available configuration to have lessons and items submitted directly to the district rather than the school (contact Schoolnet to have changed)
- 'Manage curriculum' only needed for districts that have the Curriculum Manager module

Assessment Admin Permissioning

- Many, many options
- Test category greatly impacts test visibility
- Item banks can be visible to everyone or only test administrators
- In addition to the *Assess Permissions* doc, see also:
 - *Test and Item Security Options*
 - *Co-Authored Items*
 - *Co-Authored Tests*

Where to Learn More

Available Resources

Resources for End Users

Resources for Site Administrators

Categories

- Assessment
- Classroom Reporting
- Instructional Materials
- My Schoolnet Setup
- School & District Reporting
- Curriculum Manager
- Turnaround Training
- PD Planner
- User Management**
 - > Courses
 - > Printable PDFs

USER MANAGEMENT OVERVIEW

Length: 3 pages

Understand user roles and operations.

Launch

ASSESSMENT ADMIN USER PERMISSIONS

Length: 4 pages

✓ Completed 1/5/2016

Learn what test settings, item sharing, configurations and operations apply to setting up and managing an assessment program using Assessment Admin (revised 10/15/15)

Launch

SCHOOL & DISTRICT DATA USER PERMISSIONS

Length: 2 pages

✓ Completed 10/19/2015

Understand the user operations that apply to the School & District Data module.

Launch

CLASSROOMS USER PERMISSIONS

Length: 2 pages

Understand the user operations that apply to the Classrooms

INTERVENTIONS USER PERMISSIONS

Length: 2 pages

Understand the user operations that apply to the Interventions

PD PLANNER USER PERMISSIONS

Length: 3 pages

✓ Completed 9/15/2015

Use this guide to understand the

PowerSchool User Management

Schoolnet Roles Management

In order for users to log in to Schoolnet through PowerSchool, Schoolnet roles must first be set up. Then:

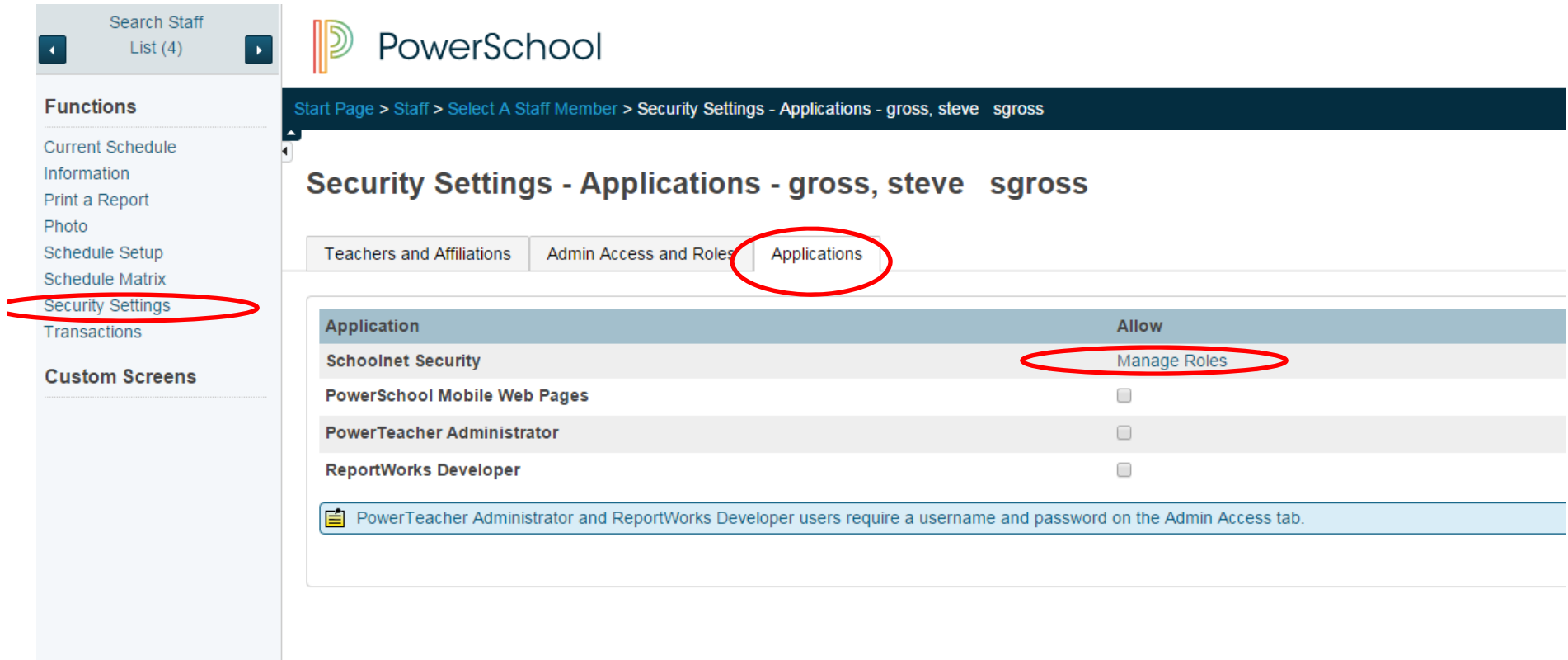
1. Go to System > Roles Administration
2. Click **Schoolnet**
3. In addition to the default roles available you can add any roles from Schoolnet that you would like SSO users to be able to utilize, but make sure to name your role exactly the same as it is named in Schoolnet.

The screenshot shows the PowerSchool interface for managing Schoolnet roles. The top navigation bar includes the PowerSchool logo, user information (Welcome, **steve gross** | Help | Sign), and school/term details (School: District Office | Term: 15-16 Y). The breadcrumb trail is Start Page > System Administrator > Roles Administration > Schoolnet Roles. A left sidebar contains navigation menus for Functions, Reports, People, Setup, and Applications. The main content area is titled "Schoolnet Roles" and features a table with columns for Name, Description, and Enabled. A "New" button is located in the top right corner of the table area.

| Name | Description | Enabled |
|-------------------------|--------------------------------------|---------|
| Teacher | Schoolnet teacher equivalent role | ✓ |
| Leadership | Schoolnet leadership equivalent role | ✓ |
| Staff | Schoolnet staff equivalent role | ✓ |
| Employee | Schoolnet employee equivalent role | ✓ |
| Test Item Administrator | Test Item Administrator | ✓ |

Define Roles for Individual Users

In order to use SSO you need to have Schoolnet roles defined for individual users. With a staff's security settings page in PowerSchool there is a Schoolnet Security Manage Roles link.



The screenshot shows the PowerSchool interface for a staff member's security settings. The breadcrumb trail is: Start Page > Staff > Select A Staff Member > Security Settings - Applications - gross, steve sgross. The page title is "Security Settings - Applications - gross, steve sgross". There are three tabs: "Teachers and Affiliations", "Admin Access and Roles", and "Applications", with the "Applications" tab selected and circled in red. The "Applications" tab contains a table with the following data:

| Application | Allow |
|------------------------------|--------------------------|
| Schoolnet Security | Manage Roles |
| PowerSchool Mobile Web Pages | <input type="checkbox"/> |
| PowerTeacher Administrator | <input type="checkbox"/> |
| ReportWorks Developer | <input type="checkbox"/> |

Below the table is a message: "PowerTeacher Administrator and ReportWorks Developer users require a username and password on the Admin Access tab." The "Security Settings" link in the left sidebar and the "Manage Roles" link in the table are also circled in red.

Schoolnet Roles Management, for users

In order to use SSO you need to have Schoolnet roles defined for individual users. With a staff's security settings page in PowerSchool there is now a Schoolnet Security Manage Roles link. When you click on it you'll see the option to add / edit the Schoolnet role for a user. Add the appropriate role for any admin or teacher, and make sure to click **Submit** when finished.

Search Staff
List (4)

PowerSchool

Welcome, **steve gross** | Help | Sign C

School: District Office Term: 15-16 Ye

Start Page > Staff > Select A Staff Member > Security Settings > Applications > Manage Schoolnet Roles for steve gross

Manage Schoolnet Roles for steve gross

| Institution | Schoolnet Role | Actions |
|--------------------|----------------|--------------|
| District Office | Leadership | Edit Clear |
| Elementary School | Leadership | Add Roles |
| Middle School | Leadership | Add Roles |
| High School | Leadership | Add Roles |
| Graduated Students | Leadership | Add Roles |

Submit

Submit

Logging In

Administrators and teachers will see a Schoolnet link in the lower left hand corner of the Start Page



Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

- System Reports
- ReportWorks

People

- Student Search
- Staff Search
- Parent Search
- Enroll New Student
- New Staff Entry
- New Parent Entry

Setup

- District
- System
- Personalize

Applications

- PowerLunch
- PS Administrator
- PT Administrator
- ReportWorks Developer
- Schoolnet

Start Page

Students | Staff | Parents

Search: [] [Advanced] [View Field L]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

K 1 2 3 4 5 6 7 8 9 10 11 12 M F All Stored Searches Stored Selections

Current Student Selection (0)

The current selection is empty.

What's New

See what's new in the latest feature release of PowerSchool. [Read more...](#)

* Note, this link is added to a PowerSchool HTML page. If you have customized that HTML page you will not see this Schoolnet SSO link. You can remove your customization, turn on SSO, then reengage your customization on top of the updated HTML page.

ALWAYS LEARNING