# PowerSchool Special Programs
# SIS Integration Administration Guide

For Version 23

PowerSchool Group LLC

# PowerSchool Special Programs
# SIS Integration Administration Guide

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# Table of Contents


Trademarks ii
Generating and Uploading the Special Programs Plugin 4
Generating the Plugin 4
Uploading the Plugin 13
Accessing PowerSchool Special Programs via Single Sign On 20
Admin Portal 20
PowerTeacher Portal 24
Parent Portal 28
Student Portal 31
Data Flow between PowerSchool SIS and Special Programs 33
Viewing Import Layouts 33
Ignoring Locations for Import 39
Continuous Integration Settings 41
Security 44
Summary Single Sign On 44
Single Sign On for Staff 44
Single Sign On for Parents/Guardians 46
Dual Access Credentials 48
Assume System ADMIN Role 57
Security Roles 58
Advanced 65
Ignore Processing Certain Locations 65
Troubleshooting 66
OpenID Logging 66
Continuous Import Testing Mode 66
Stuck Continuous Import 67
Special Programs Links Missing 68
Special Programs Links Present but Embedded Pages Missing 69
Embedded Page Not Available in PowerTeacher 70
IFrame Does Not Load in PowerSchool SIS 70

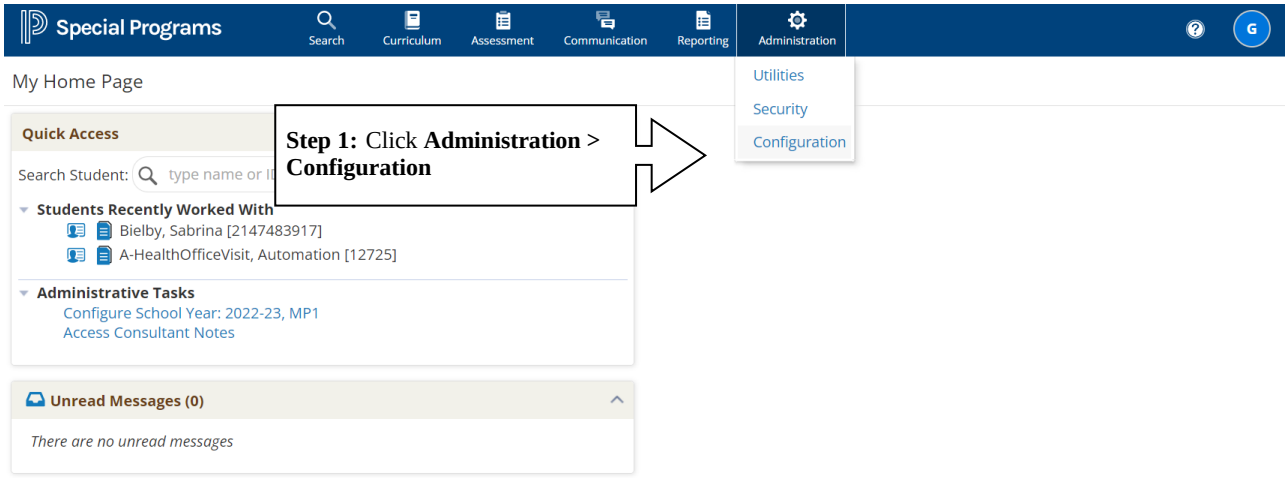
# Chapter 1

# Generating and Uploading the Special Programs Plugin

To integrate PowerSchool SIS and PowerSchool Special Programs, a plugin must be uploaded and installed using the PowerSchool Admin portal. This plugin establishes secure server-to-server authentication, data transfer, single sign-on and the embedded user interface.

## Generating the Plugin

The PowerSchool Special Programs plugin can be generated directly within the Special Programs web application. The plugin generator setup screen has multiple options that determine how the plugin behaves. The plugin that is generated based on those options is downloaded as a zip file that can be uploaded to PowerSchool SIS.



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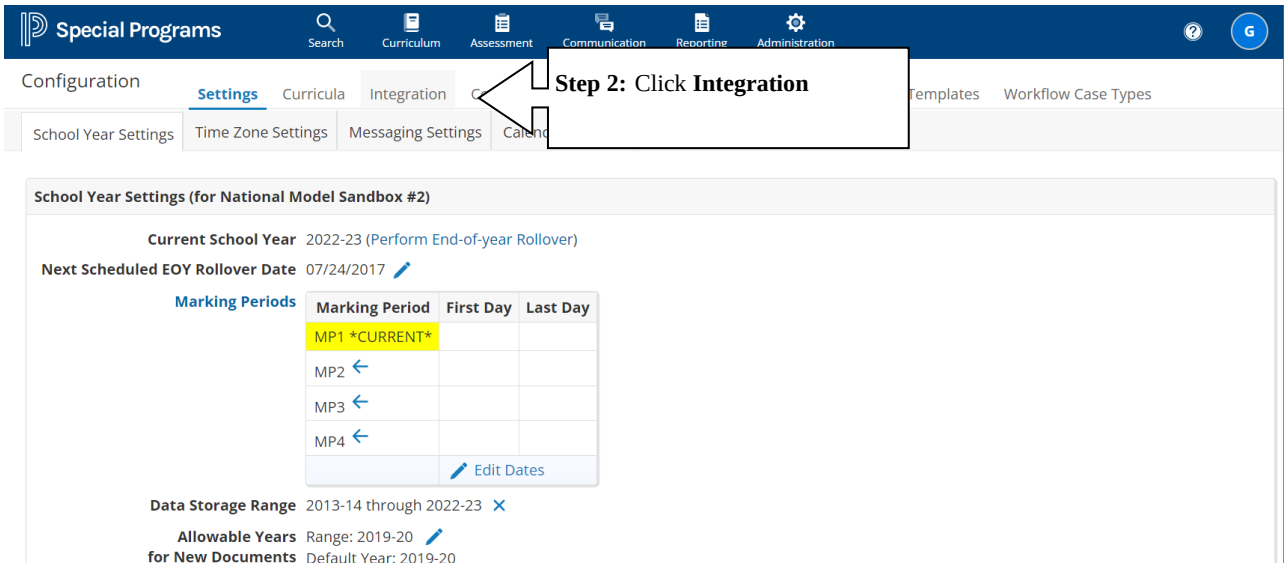


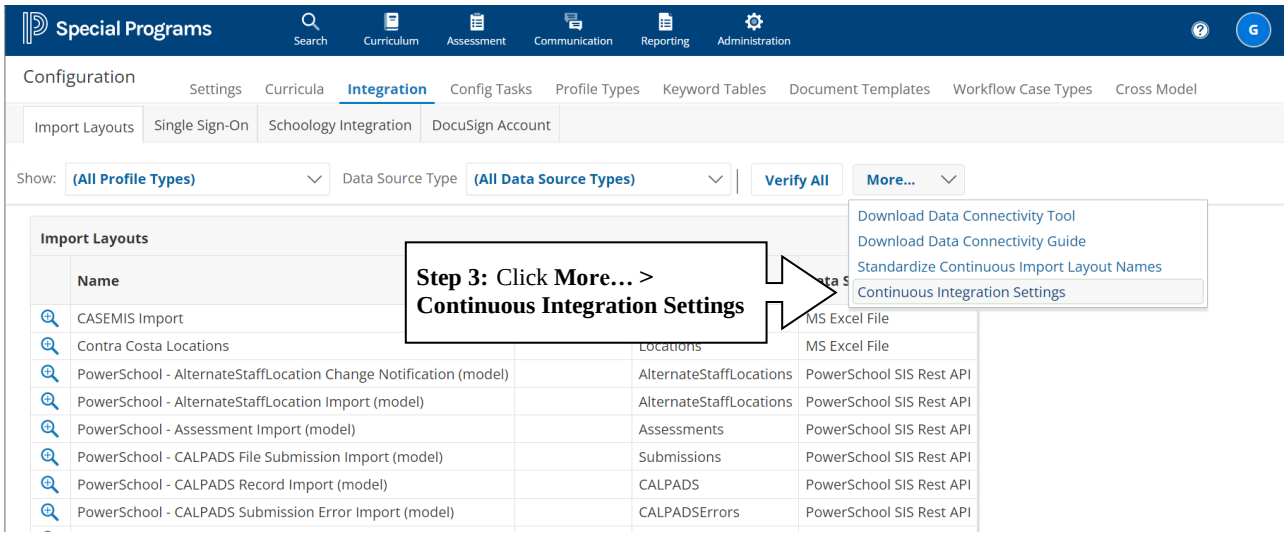


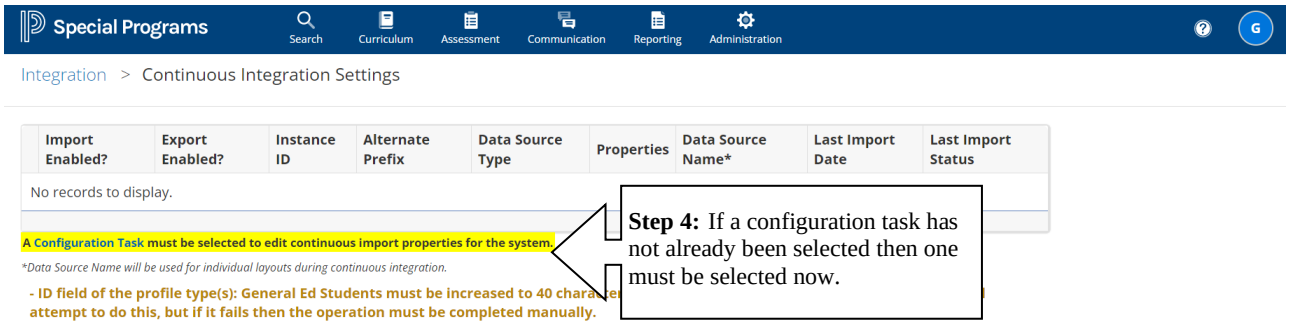




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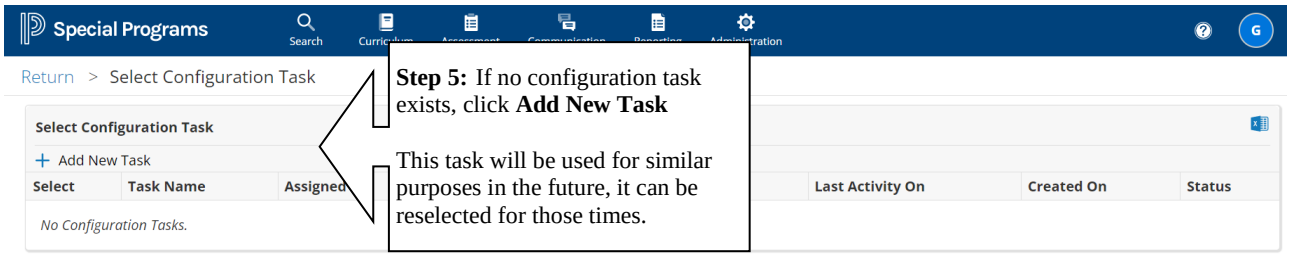


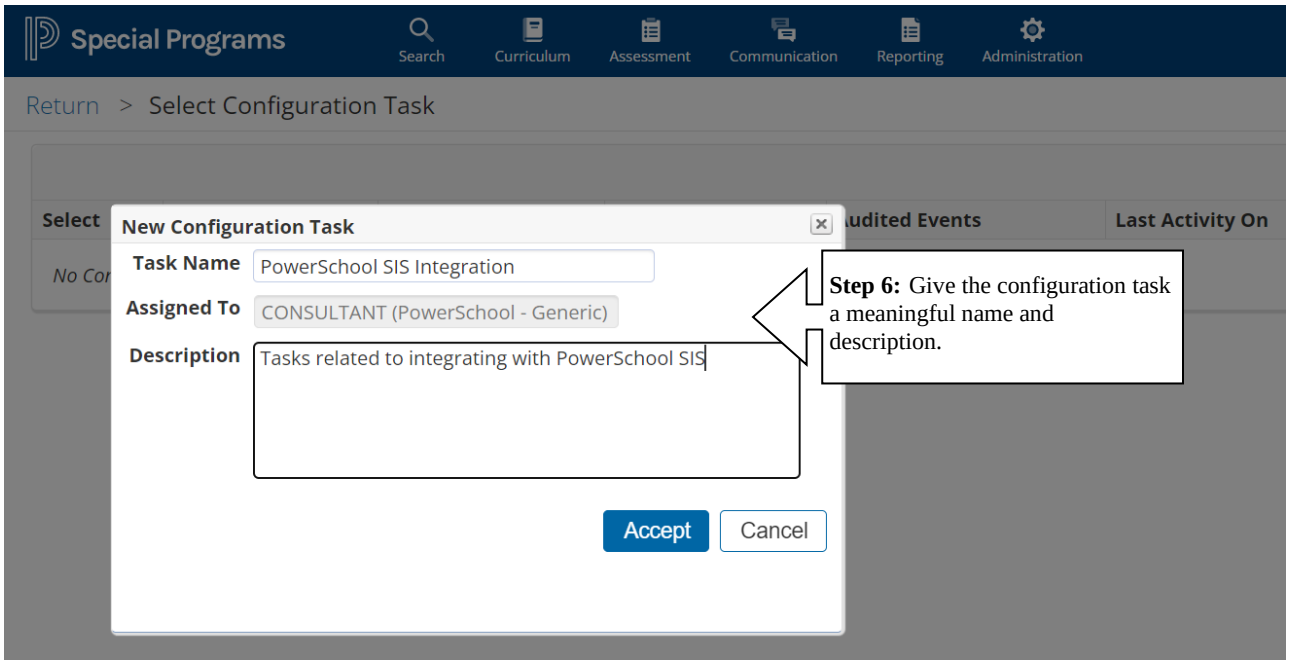


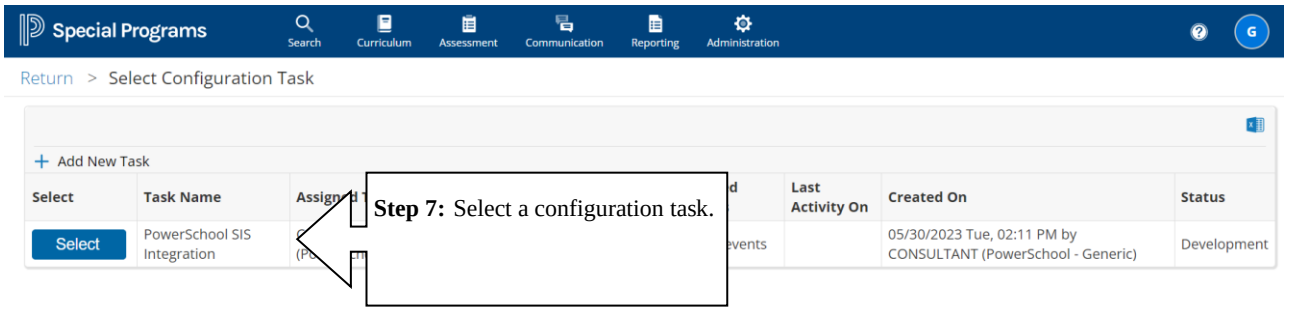



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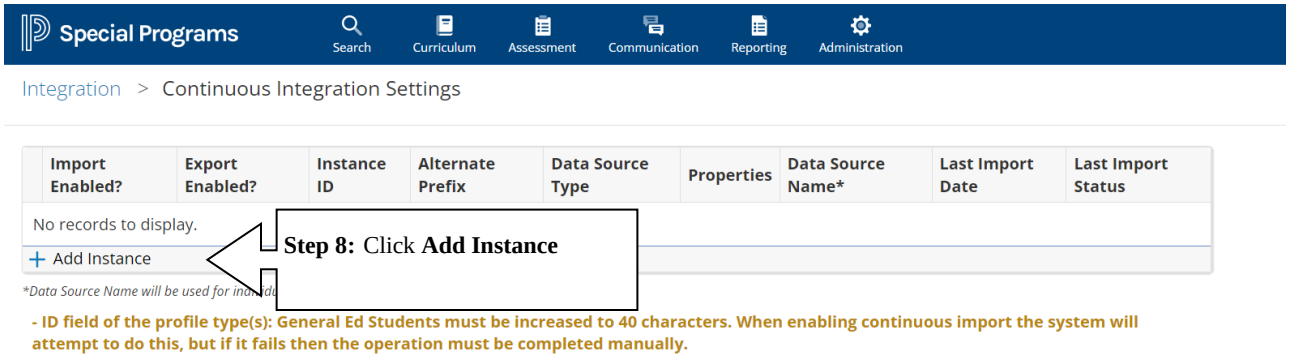
Note that the following screens show how to set up a new PS SIS instance. If that has already been done and you simply wish to download an newer plugin to update PS SIS then skip to here.

## Add a New PowerSchool SIS Instance





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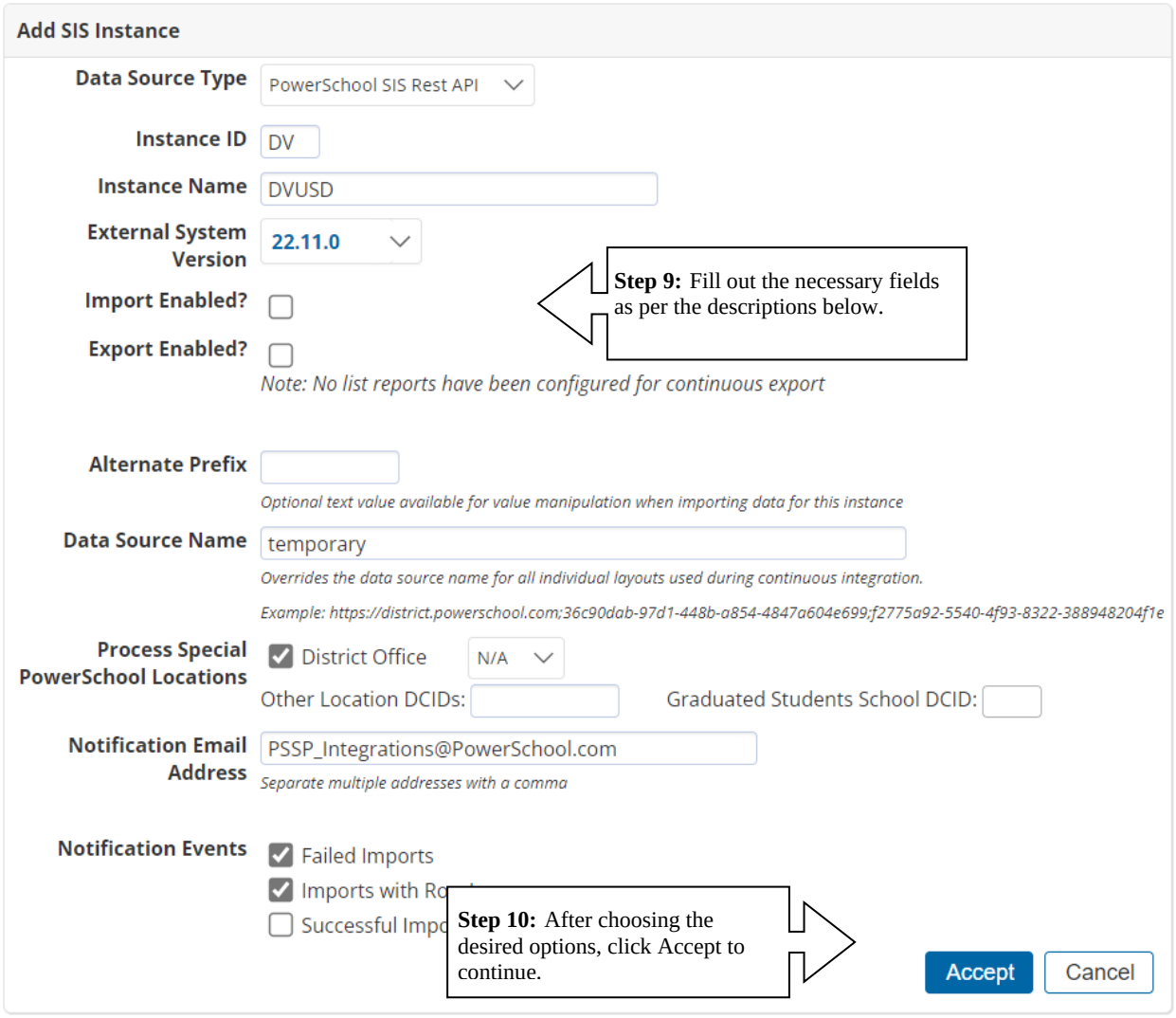




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**Data Source Type** – set this to PowerSchool SIS Rest API

**Instance ID** – assign a code of up to 3 characters that identifies the SIS instance. Note that these codes are only used within PowerSchool Special Programs and do not need to match anything in the SIS instance itself. If more than one SIS instance will be integrated with this Special Programs database, this instance ID is required to be unique.

**Instance Name** – set this to a meaningful name for the SIS instance

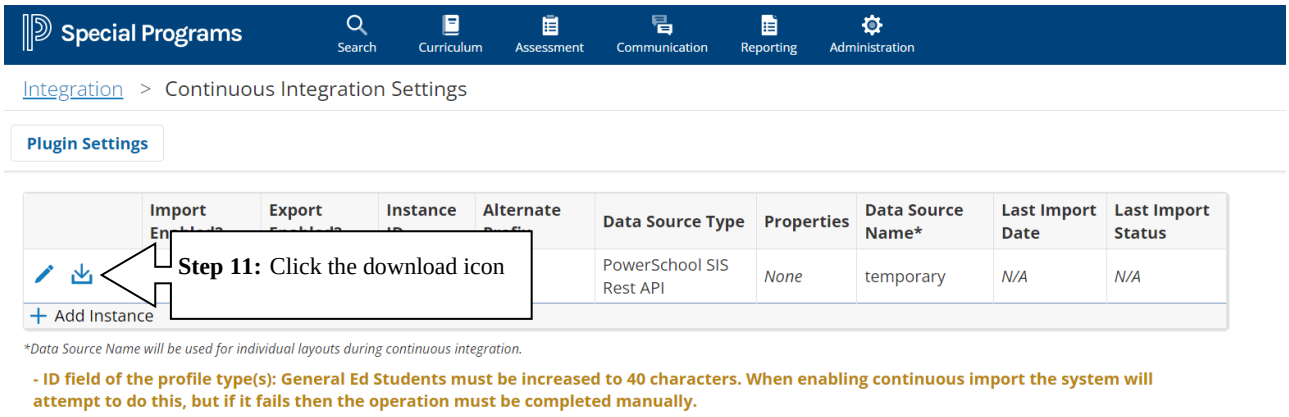
**External System Version** – indicates the current version of the SIS instance. Earlier versions of SIS do not support some integration functionality

**Data Source Name** – this will eventually hold the full SIS server URL and access codes. If a Special Programs plugin has not been loaded into the SIS Instance yet, then there are no access codes generated – if that is the case enter **temporary**. This will be replaced later with the information Special Programs needs to communicate with SIS.

**District Office** – to have the SIS district office included in queries for staff information, check this

**Notification Email Address** – enter a district user email address for a person who will receive status and error information and has the ability to follow up with import issues as they arise

### Download Plugin





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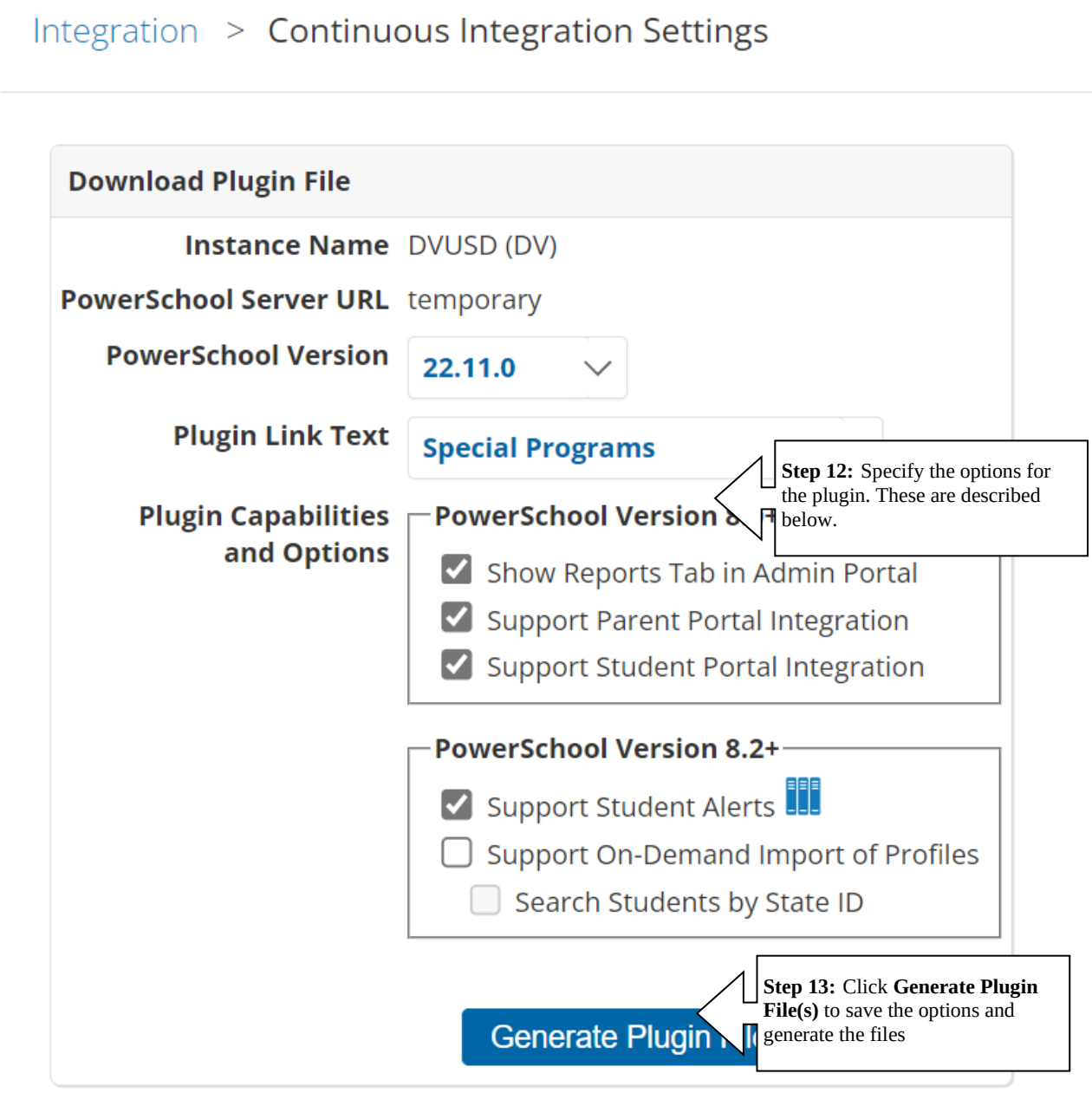


**Instance Name** – this is the name of the PS SIS instance suffixed with the Instance ID in parenthesis.

**PowerSchool Server URL** – the configured URL of the PS SIS instance

**PowerSchool Version** – the version of the PS SIS instance. Earlier versions do not support some functionality

**Plugin Link Text** – this is the text that appears in the PS SIS user interface to SSO into PS Special Programs. The default is "Special Programs"


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**Plugin Capabilities and Options** – various options that control how the plugin behaves within PS SIS:

- Show Reports Tab in Admin Portal – indicates that a Special Programs reports tab will be added to PowerSchool SIS. Reports in PS Special Programs can be configured to display a link in the SIS report tab, which when clicked, will launch a tab directly to the report

- Support Parent Portal Integration – selecting this option has the plugin request access to additional SIS fields that can be used to integrate Special Programs with the SIS parent portal, and an SSO link to PS Special Programs will be included for parent users

- Support Student Portal Integration – selecting this option has the plugin request access to additional SIS fields that can be used to integrate Special Programs with the SIS student portal, and an SSO link to PS Special Programs will be included for student users

- Support Student Alerts – this option generates a schema plugin zip file that adds 8 alert fields for students. PS Special Programs state/province models have been configured to populate these alert fields.

- Support On-Demand Import of Profiles – instead of importing all students into the GeneralEdStudents profile, an option is to only import students currently in the Special Programs program. Then when adding a new student, the user can choose a student in SIS to import their information into PS Special Programs immediately (on-demand)

    - Search Students by State ID – this option indicates that state student IDs are being used and searching (for an on-demand import) should use the state ID field in PS SIS.


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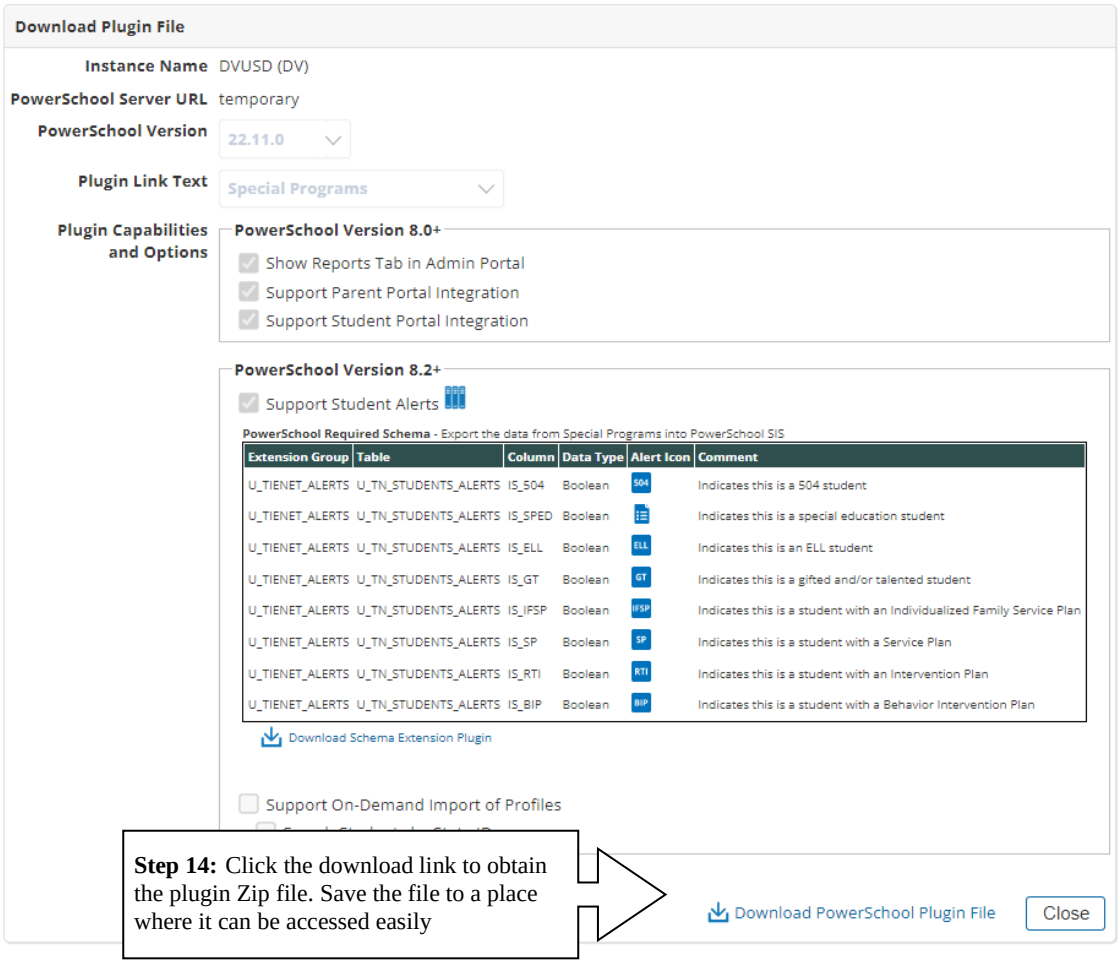


**Step 14:** Click the download link to obtain the plugin Zip file. Save the file to a place where it can be accessed easily



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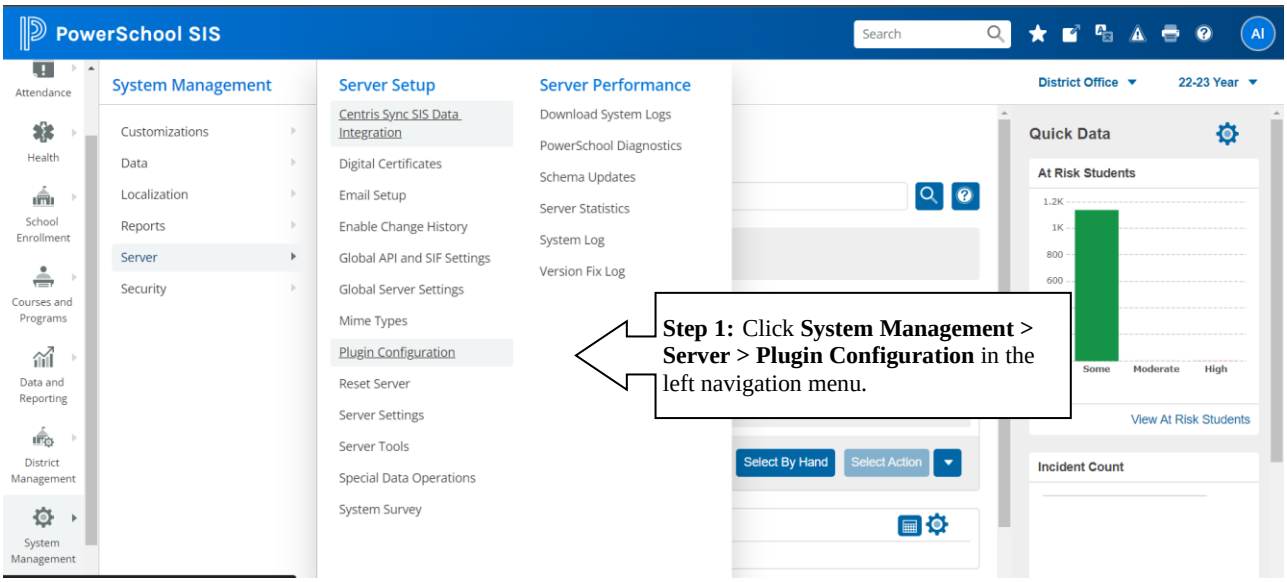
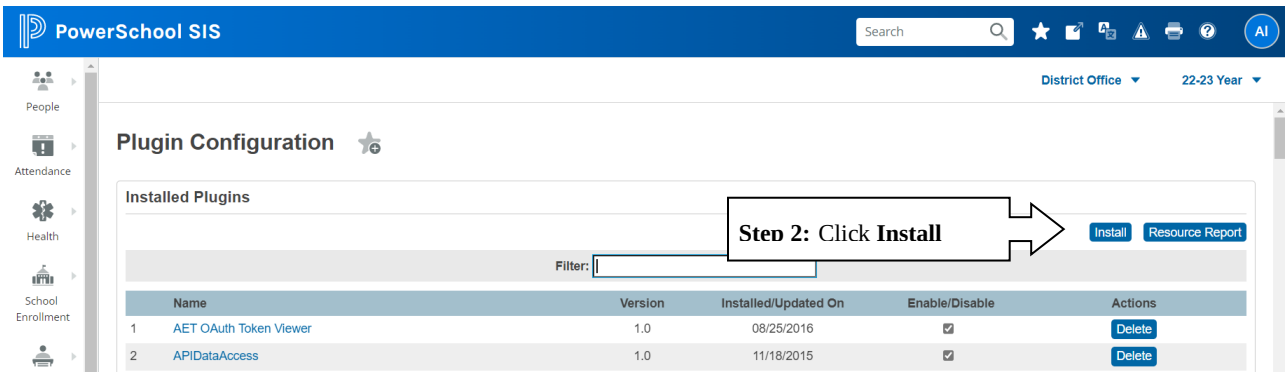
## Uploading the Plugin

After generating your plugin zip file, place it on your desktop or other location for easy access later. Then sign into your PowerSchool Admin Portal and proceed with the steps below.




At this point if the Special Programs plugin has never been loaded then follow the steps below. If the Special Programs plugin was previously loaded and you simply wish to update it with a new version of the plugin (client ID and secret will be unchanged) then skip to here.





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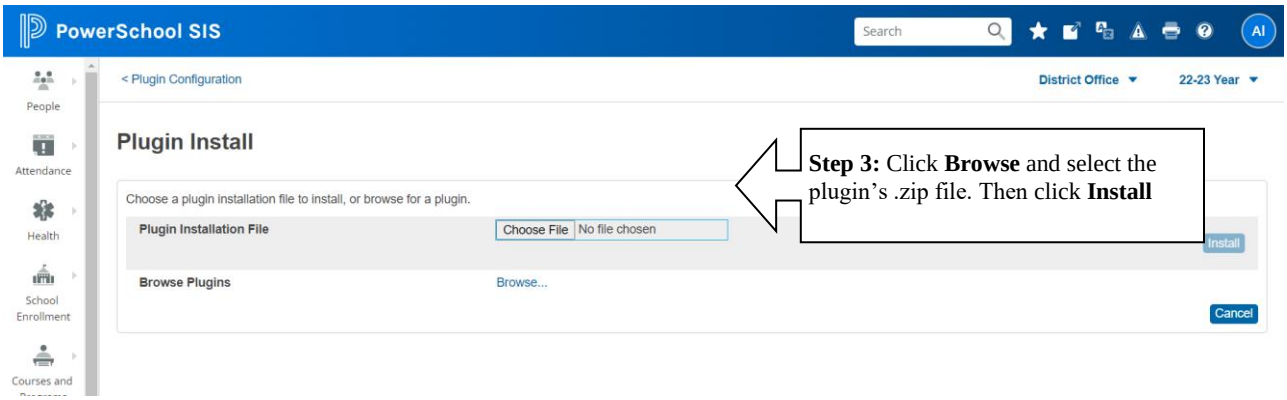


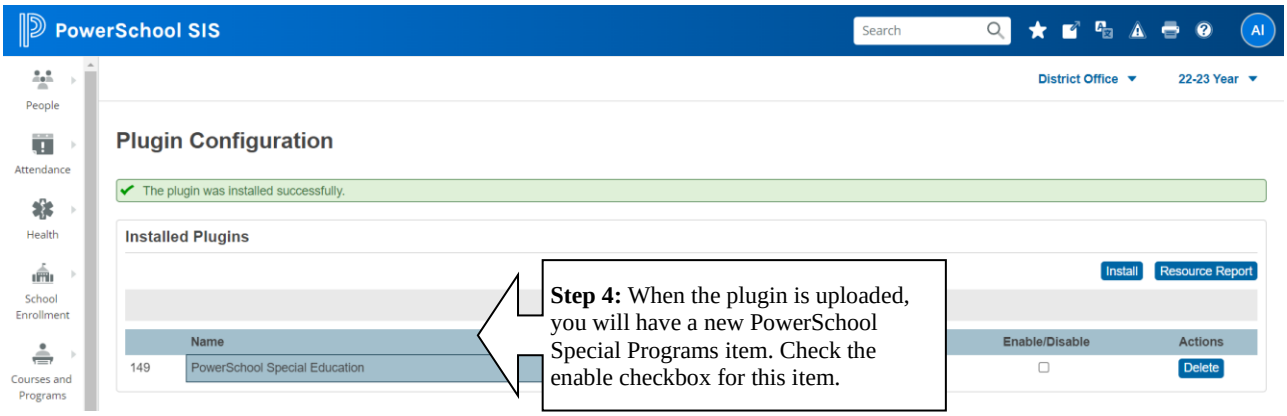


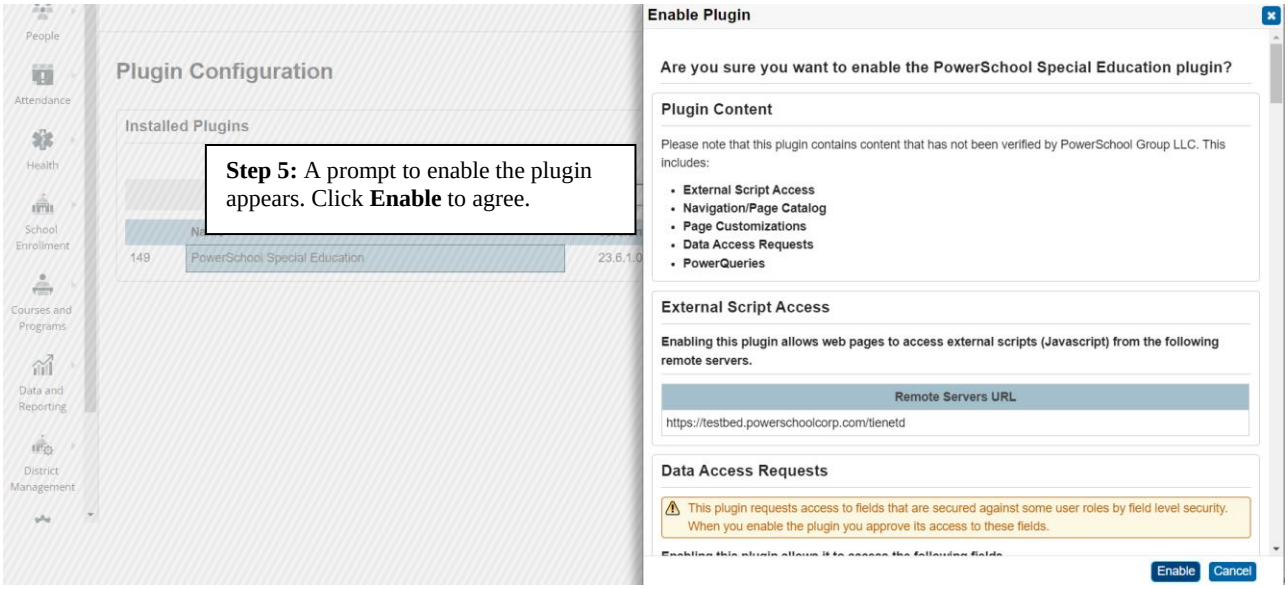



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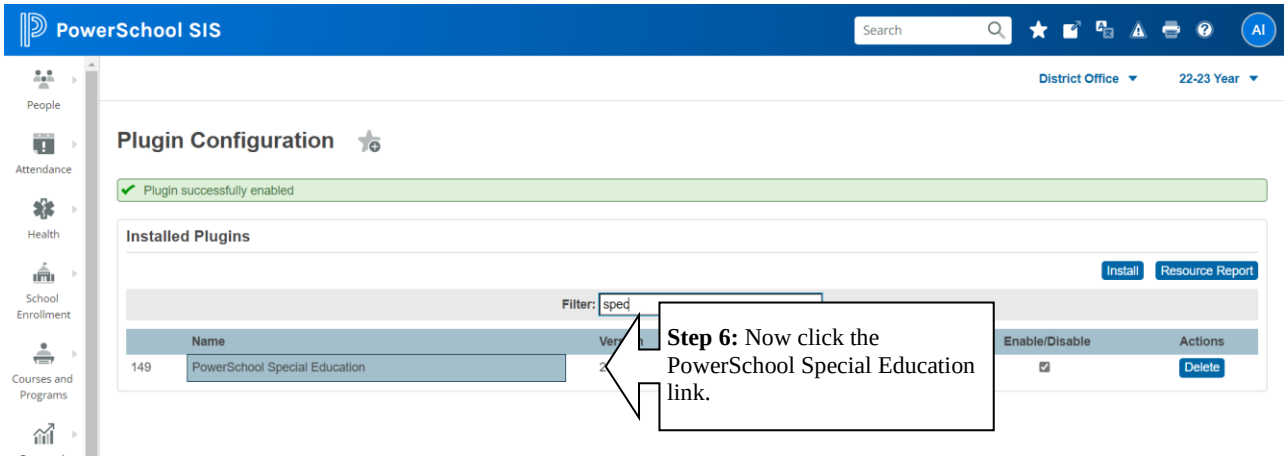


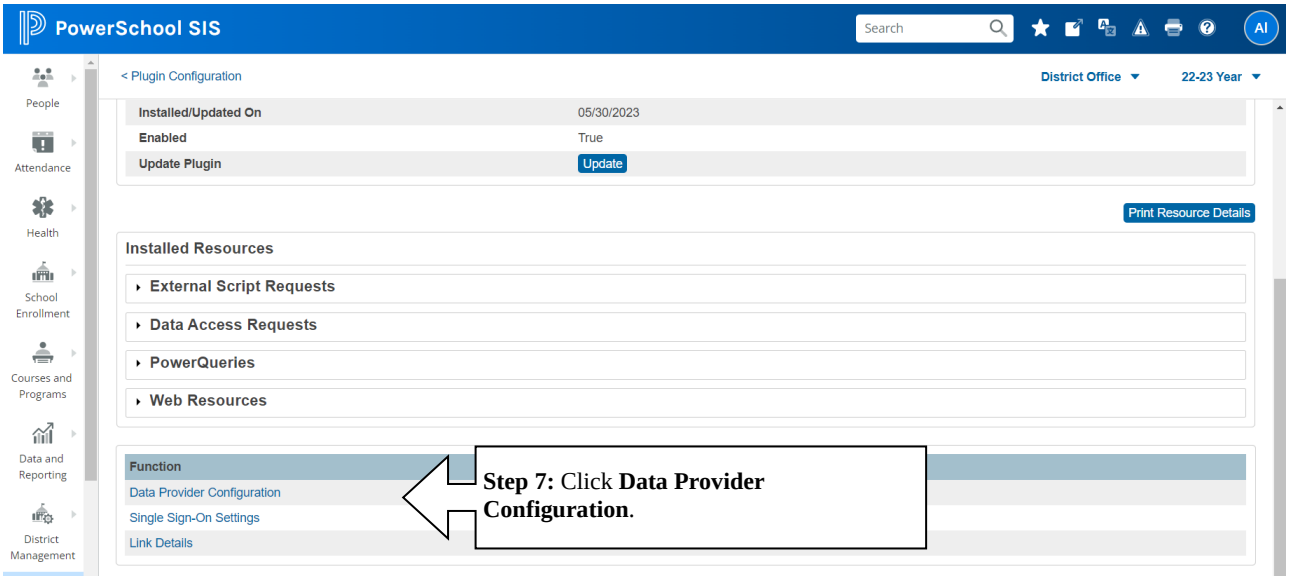



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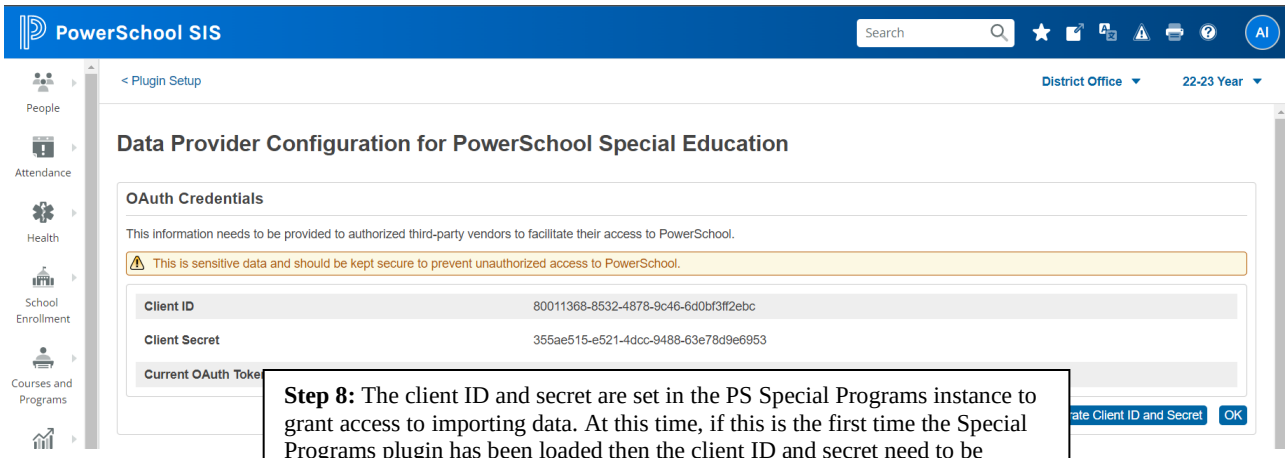


**Step 8:** The client ID and secret are set in the PS Special Programs instance to grant access to importing data. At this time, if this is the first time the Special Programs plugin has been loaded then the client ID and secret need to be loaded into the Special Programs instance record.


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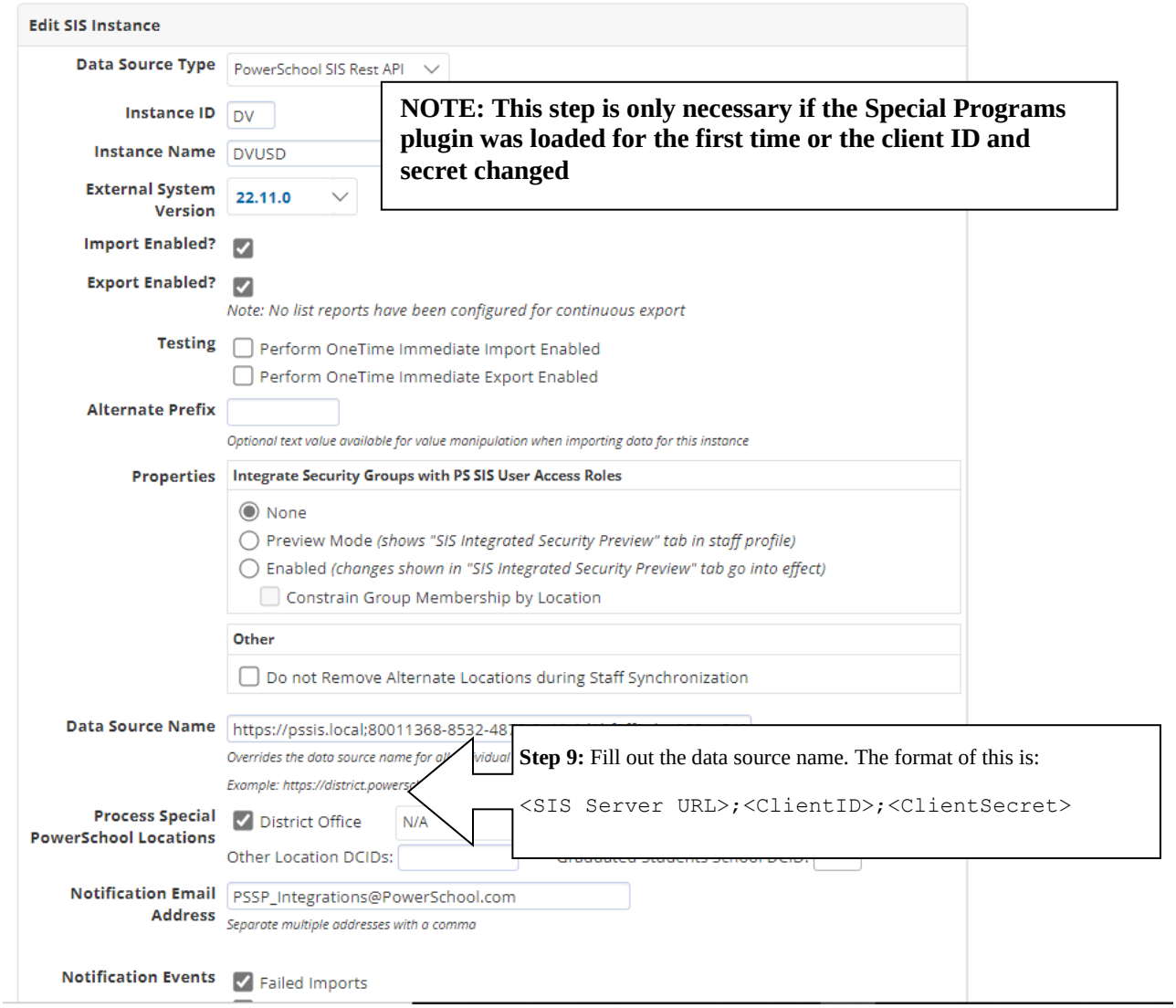




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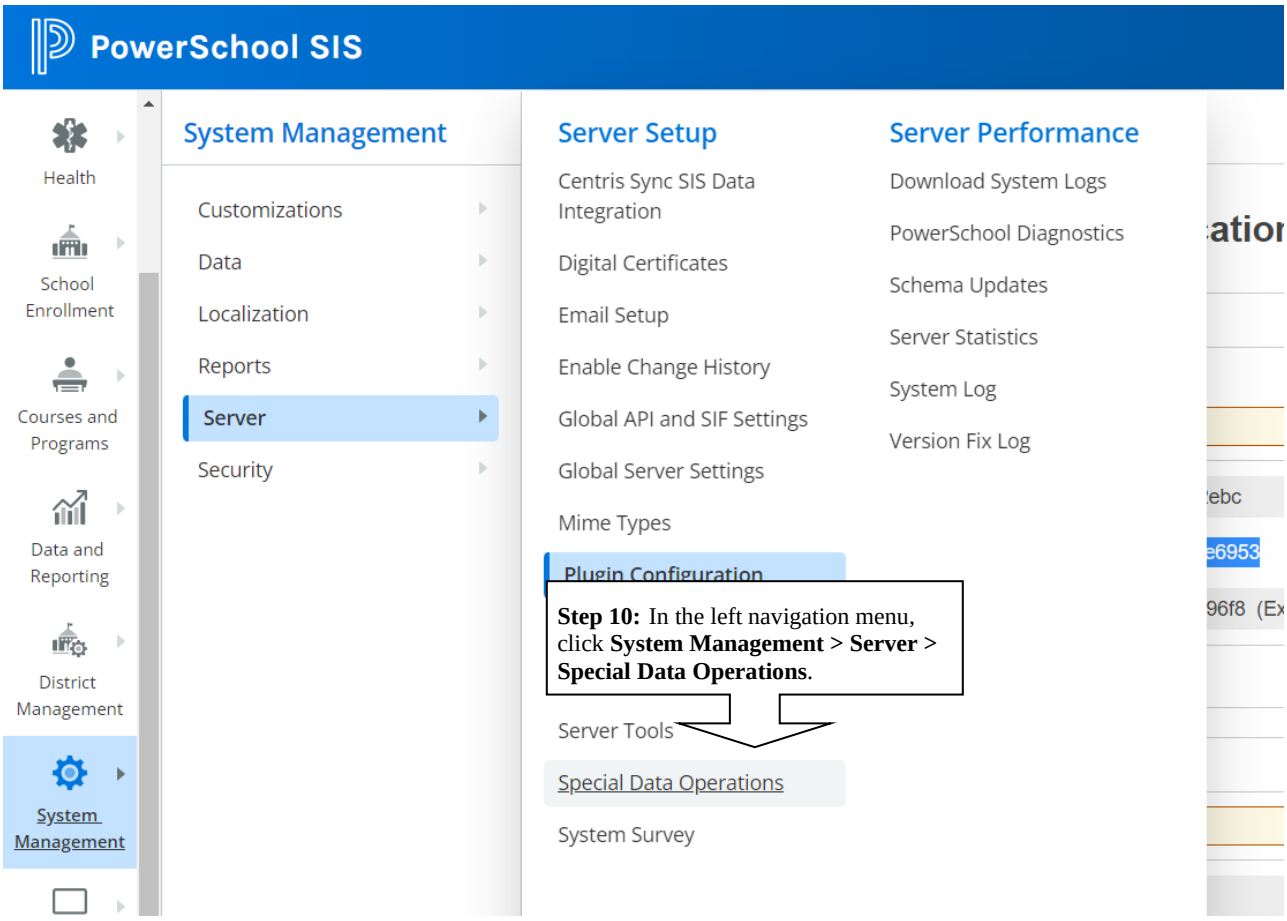


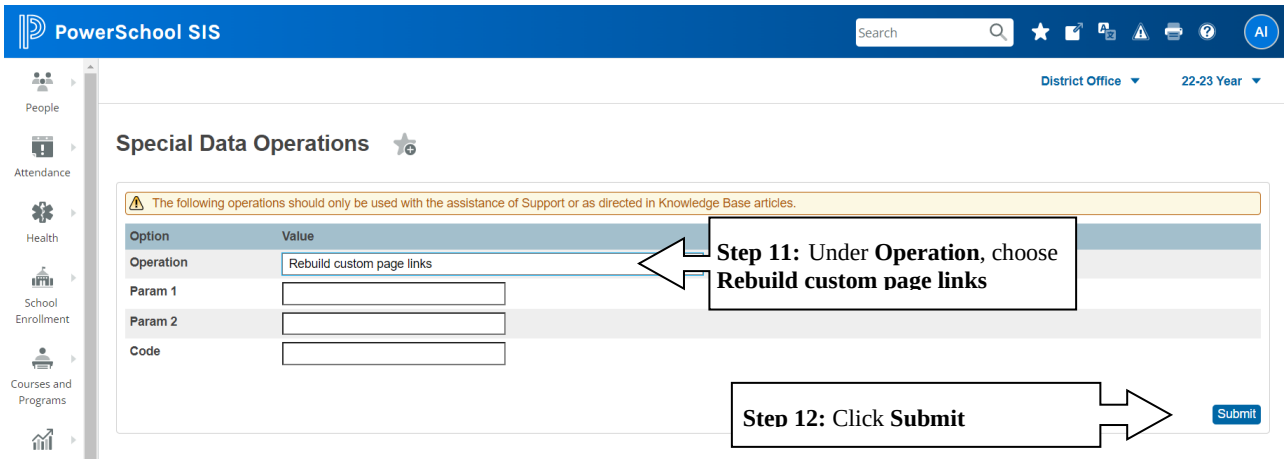


You have now completed uploading the PowerSchool Special Programs plugin. Your PowerSchool Special Programs representative will now work with you to initiate data integration and single sign-on integration.


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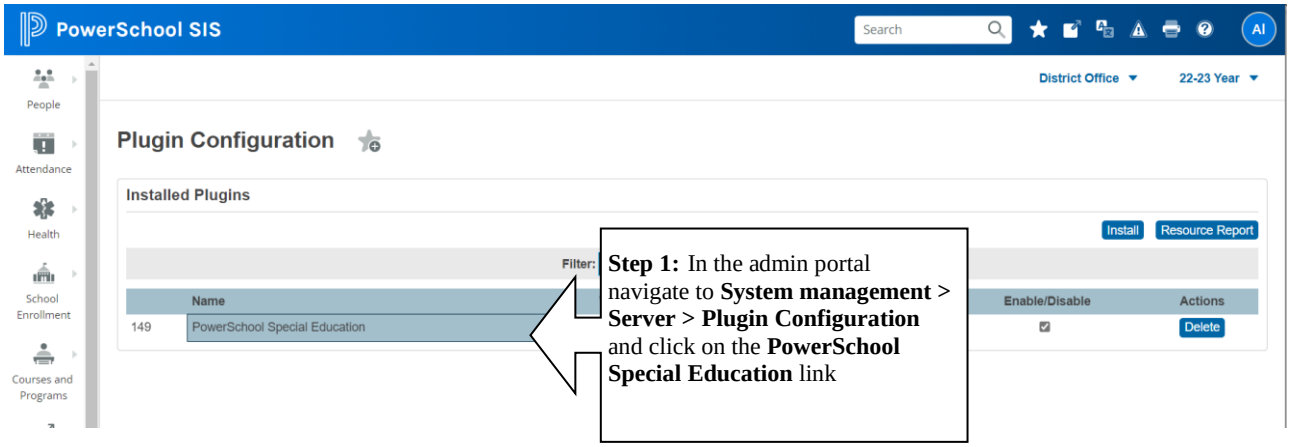
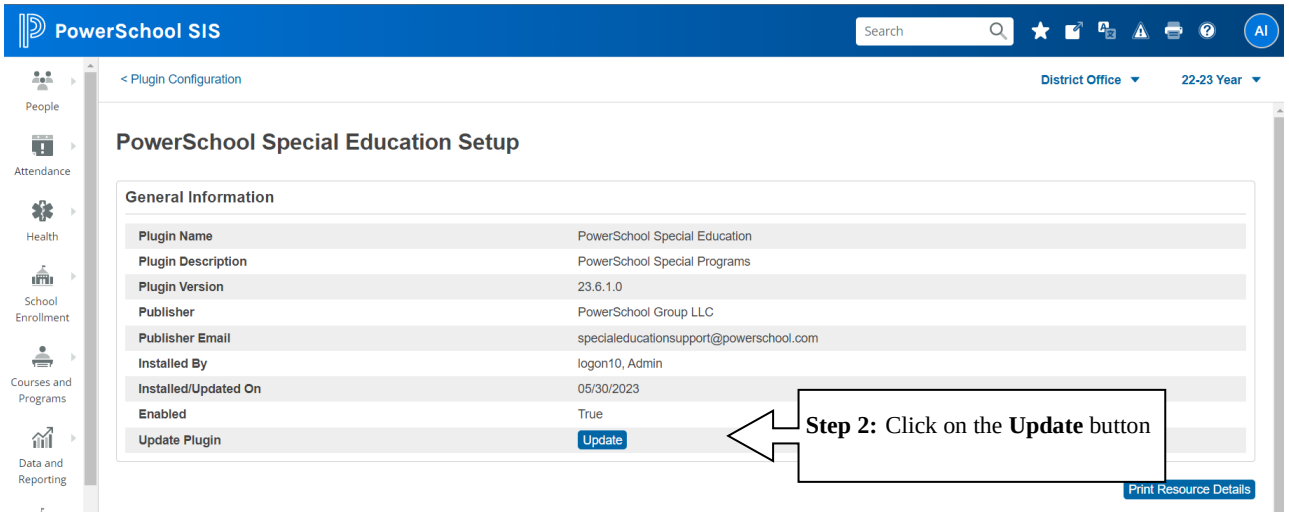
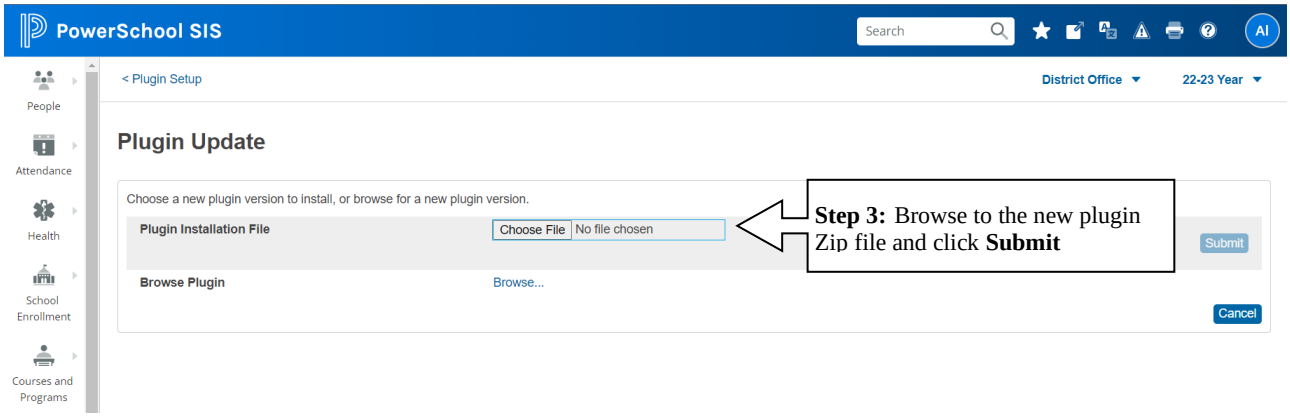
### Updating the PowerSchool Special Programs Plugin

Once the plugin has been loaded initially, it can be updated after that, which retains the client ID and secret. This is a useful, low-impact way to have the Special Programs plugin have the latest changes.



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# Accessing PowerSchool Special Programs via Single Sign On

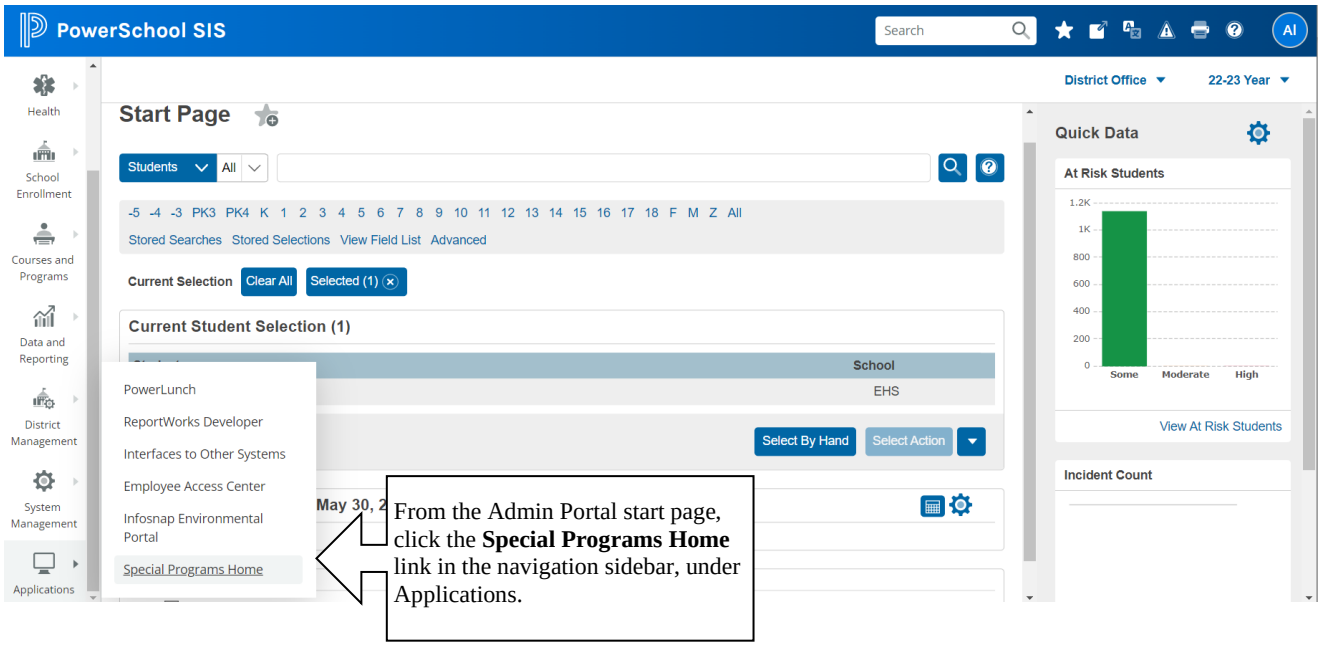
Chapter 2

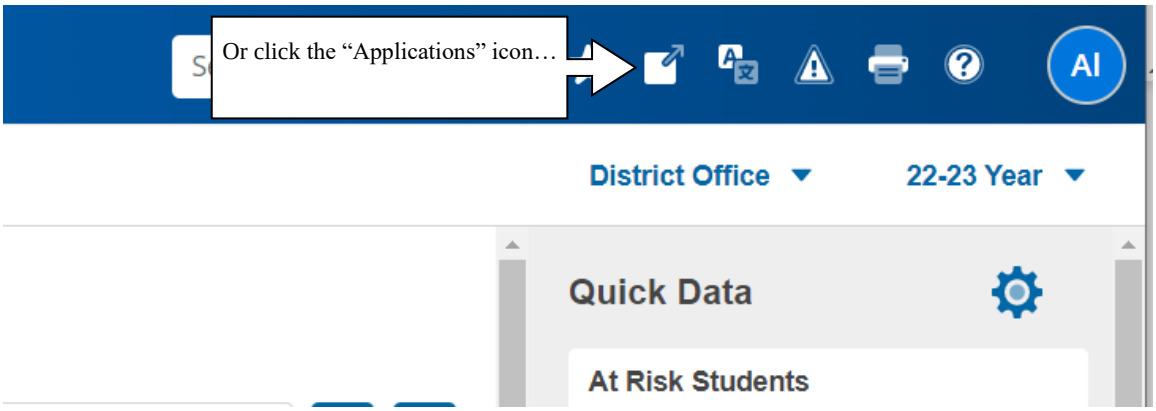
*This section covers how you access PowerSchool Special Programs from the PowerSchool Admin, PowerTeacher, and Parent portals. Note that this will only work correctly when data integration is completed for your system, and security has been set up.*

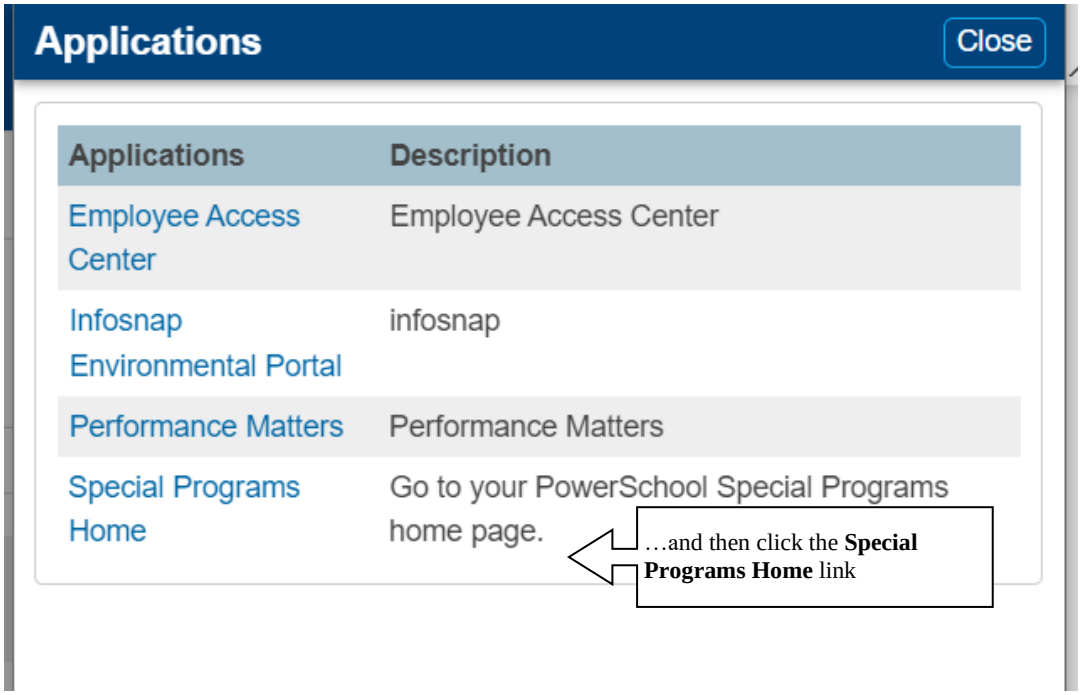
## Admin Portal

There are two types of links to PowerSchool Special Programs from the Admin Portal. One type brings you to the PowerSchool Special Programs home page. The other type is in the context of a specific student and brings you to that student's Special Programs documents.

### Admin Portal Links to PowerSchool Special Programs Home page







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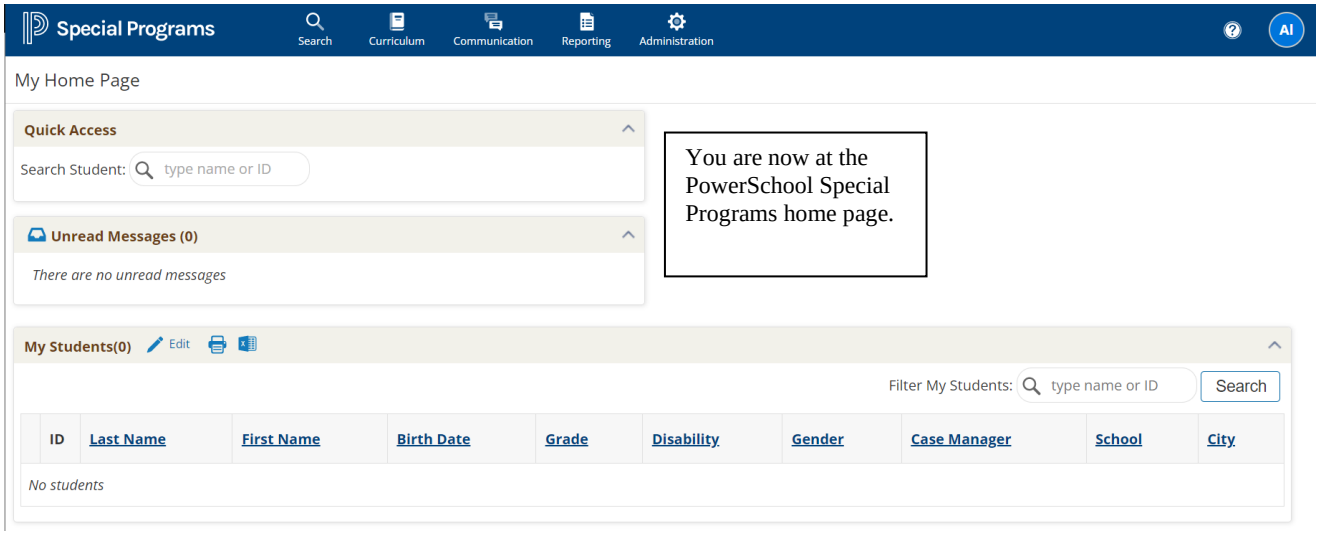
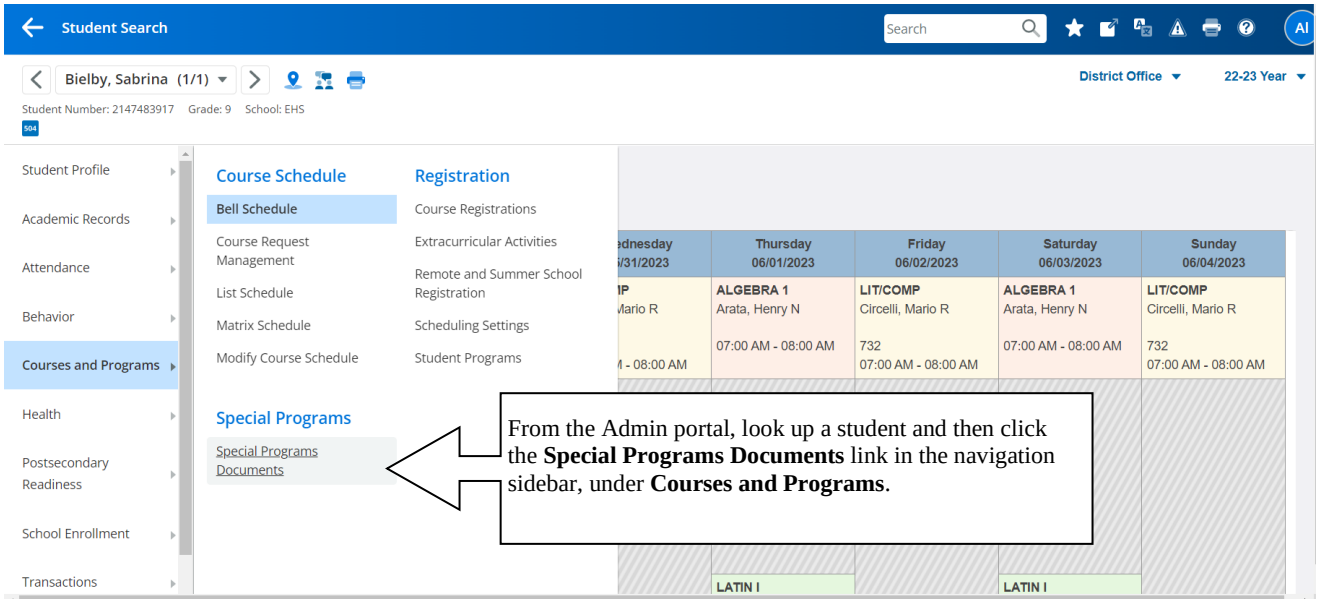



## Admin Portal Links to PowerSchool Special Programs Special Programs Documents





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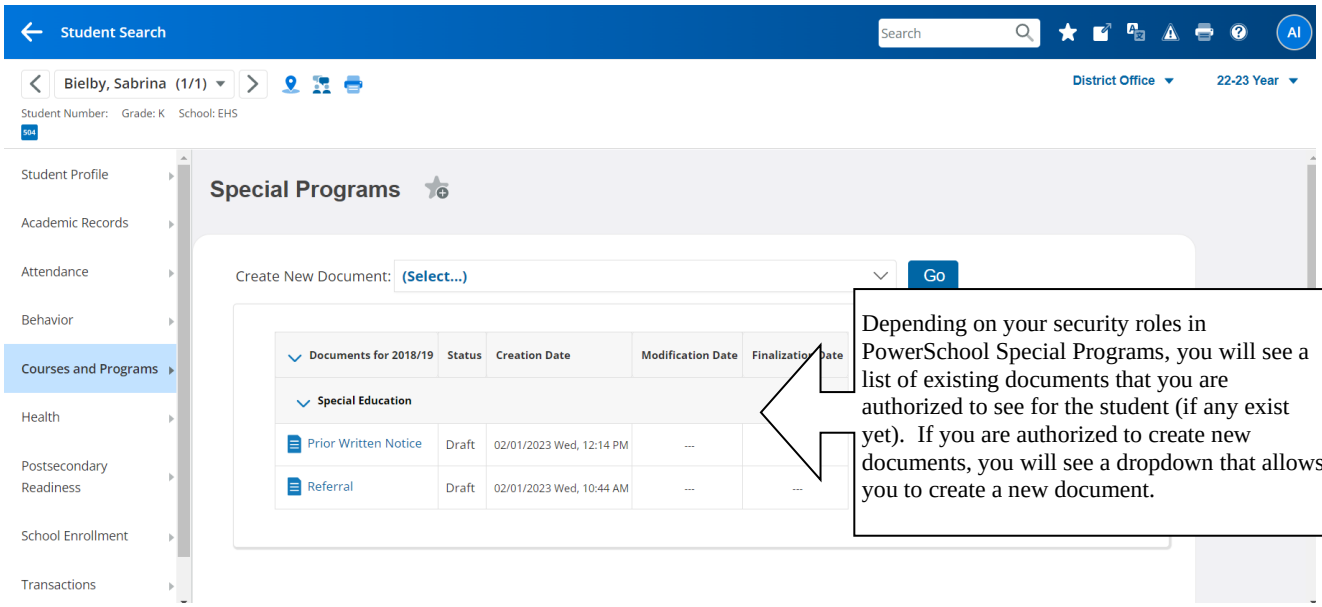


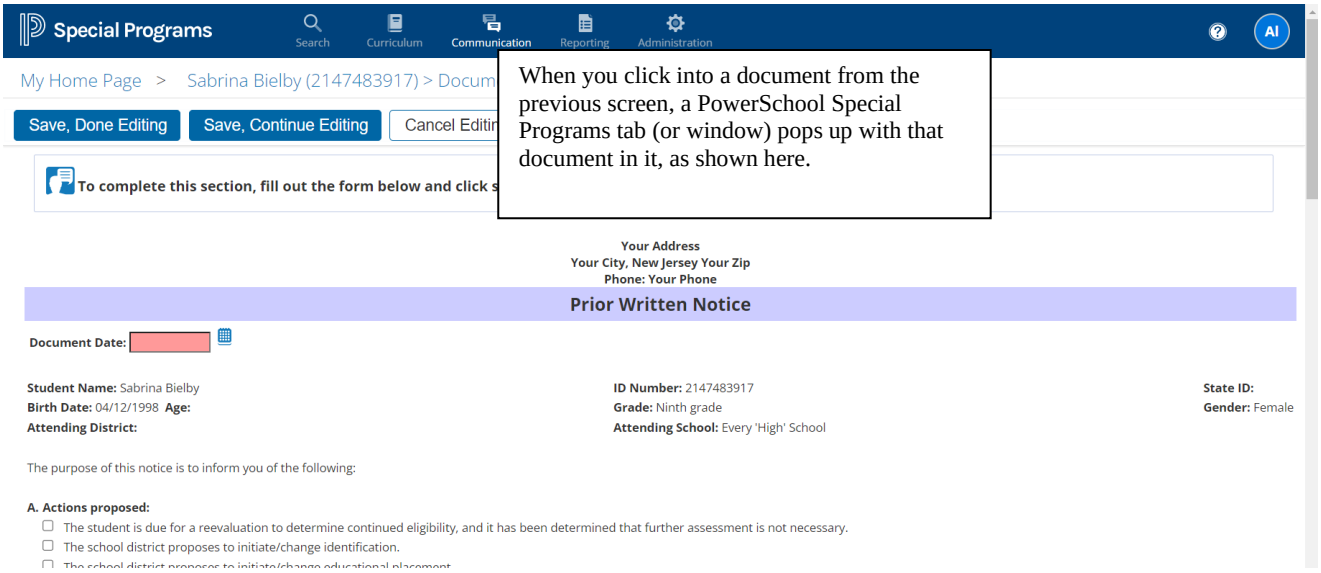



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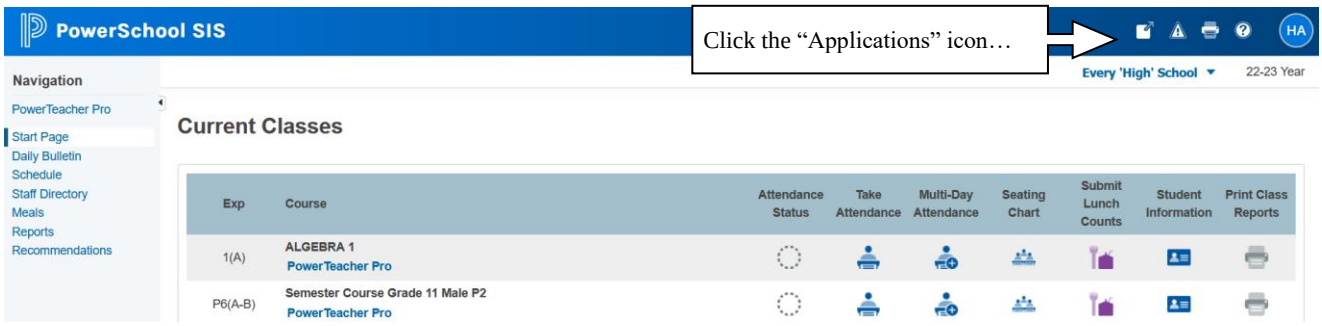
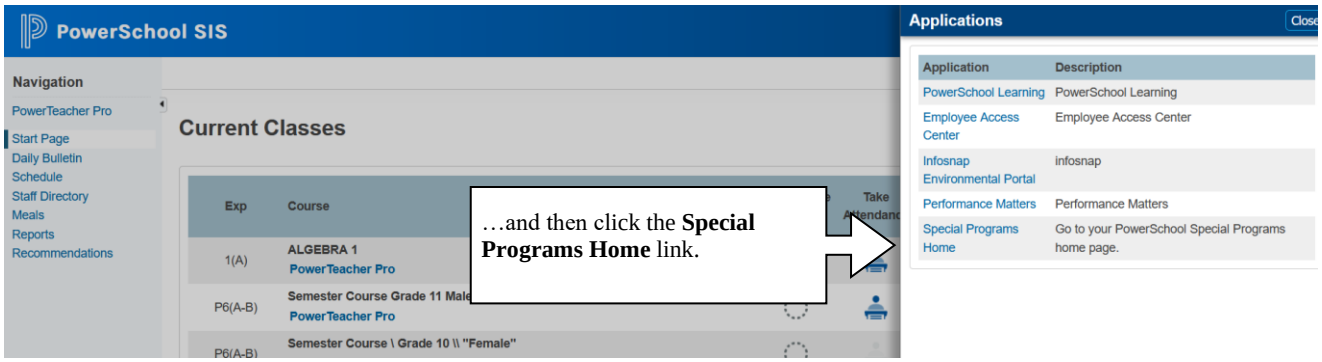
## PowerTeacher Portal

There are two links to PowerSchool Special Programs from the PowerTeacher portal. One brings you to the PowerSchool Special Programs home page. The other appears in the context of a specific student and brings you to that student's Special Programs documents. Additionally, there is a third option, if configured for your database, which allows staff to directly access PowerSchool Special Programs using the PowerSchool Special Programs login page, bypassing PowerSchool's Single Sign on.

## PowerTeacher Link to PowerSchool Special Programs Home page





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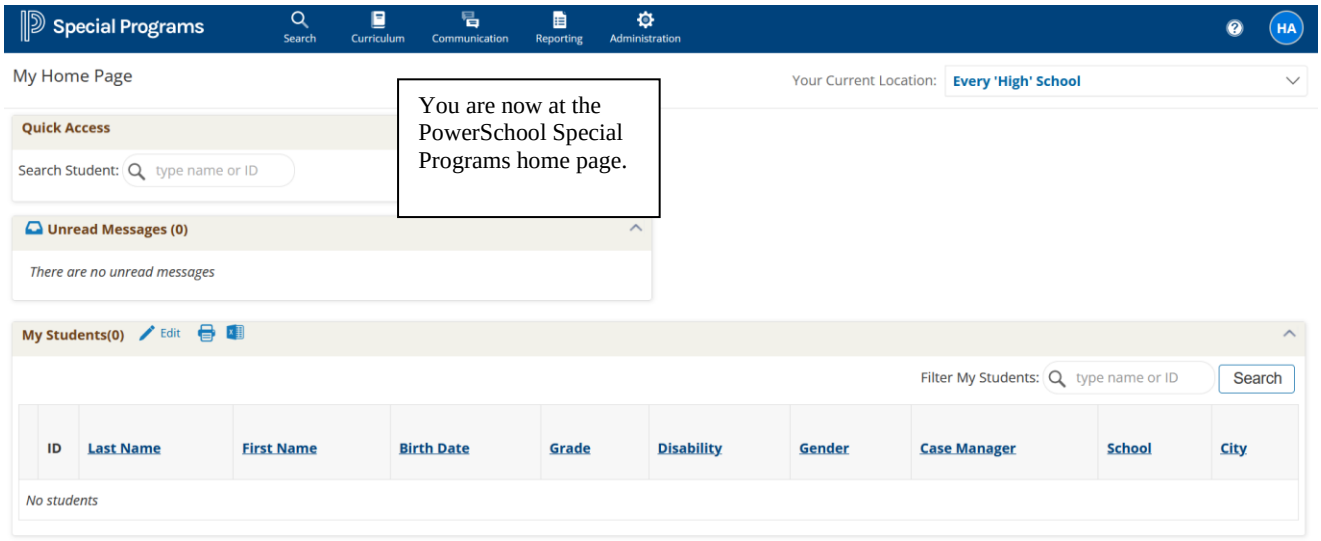
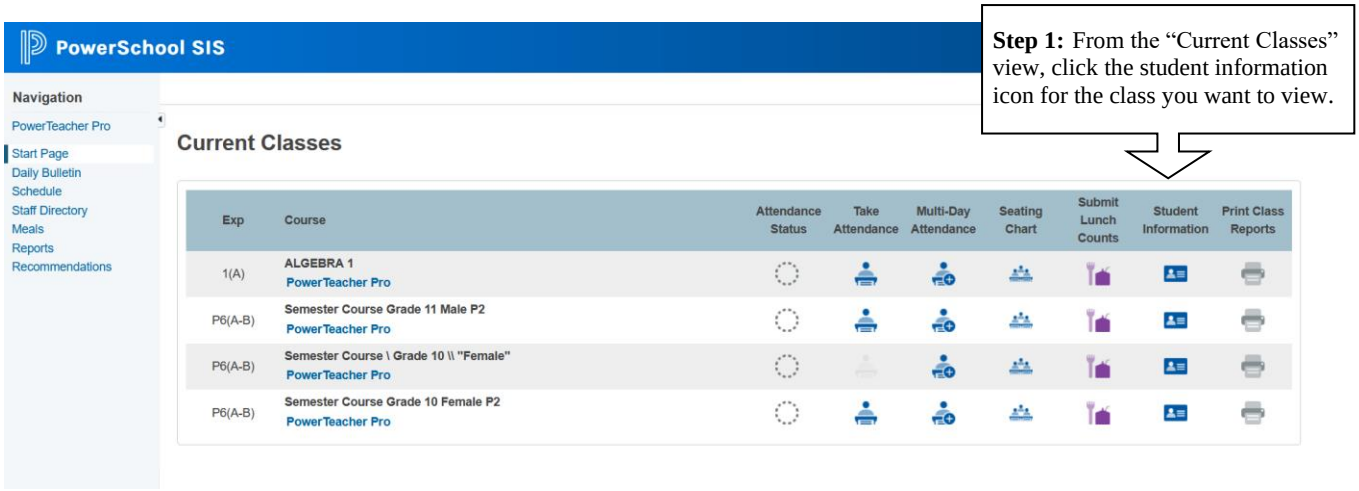



## PowerTeacher Links to PowerSchool Special Programs Special Programs Documents





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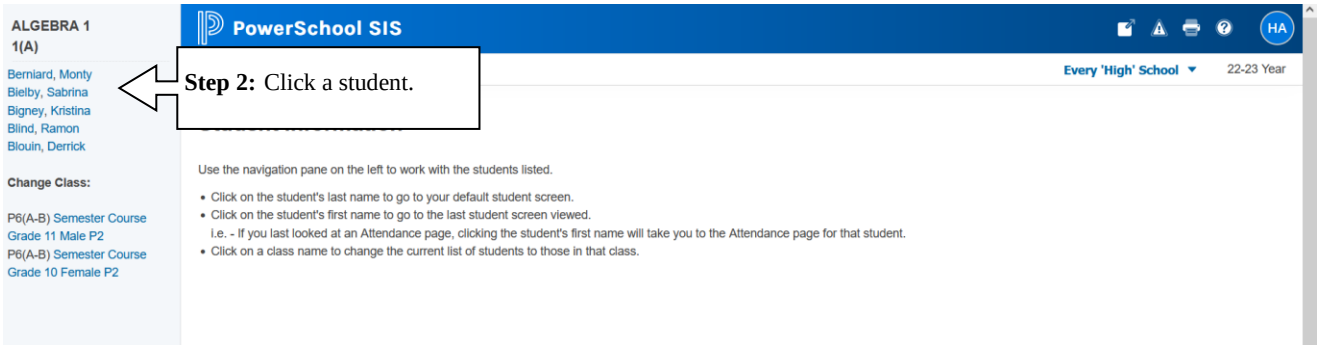


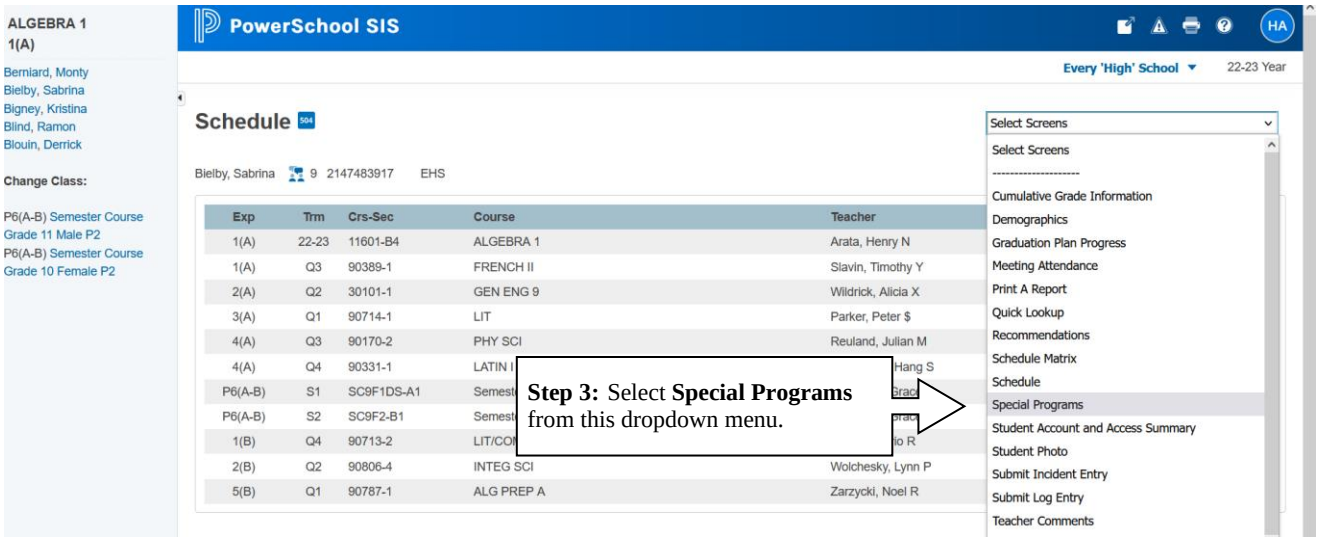



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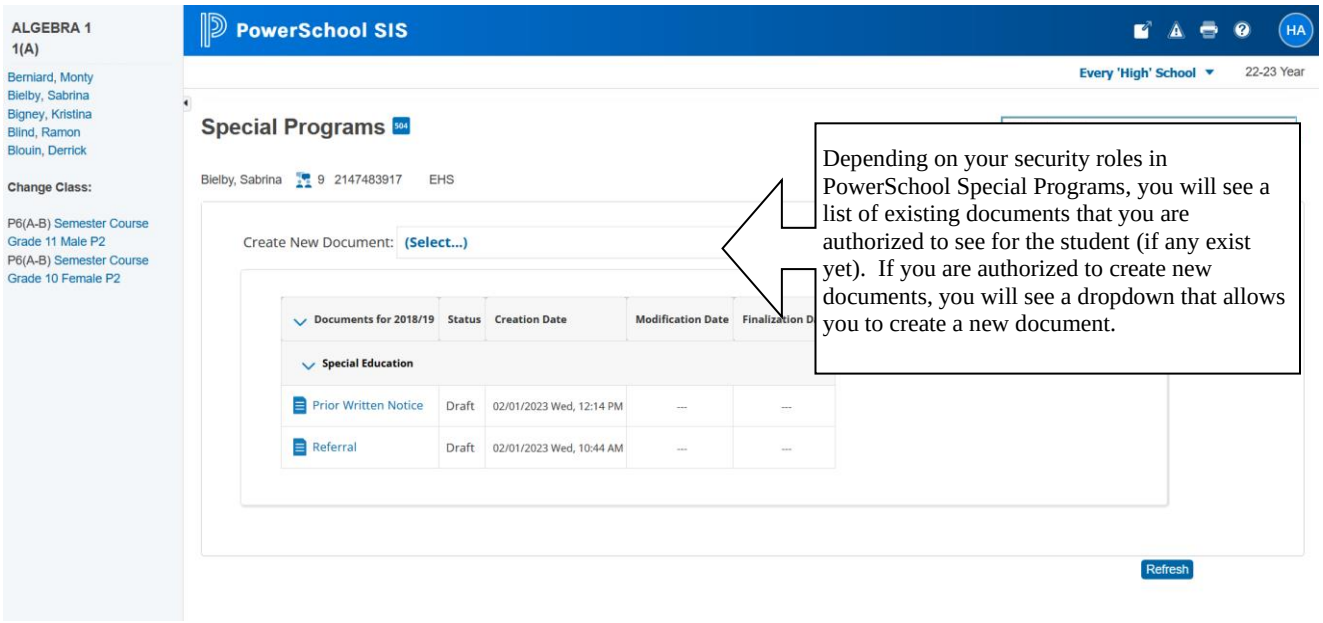
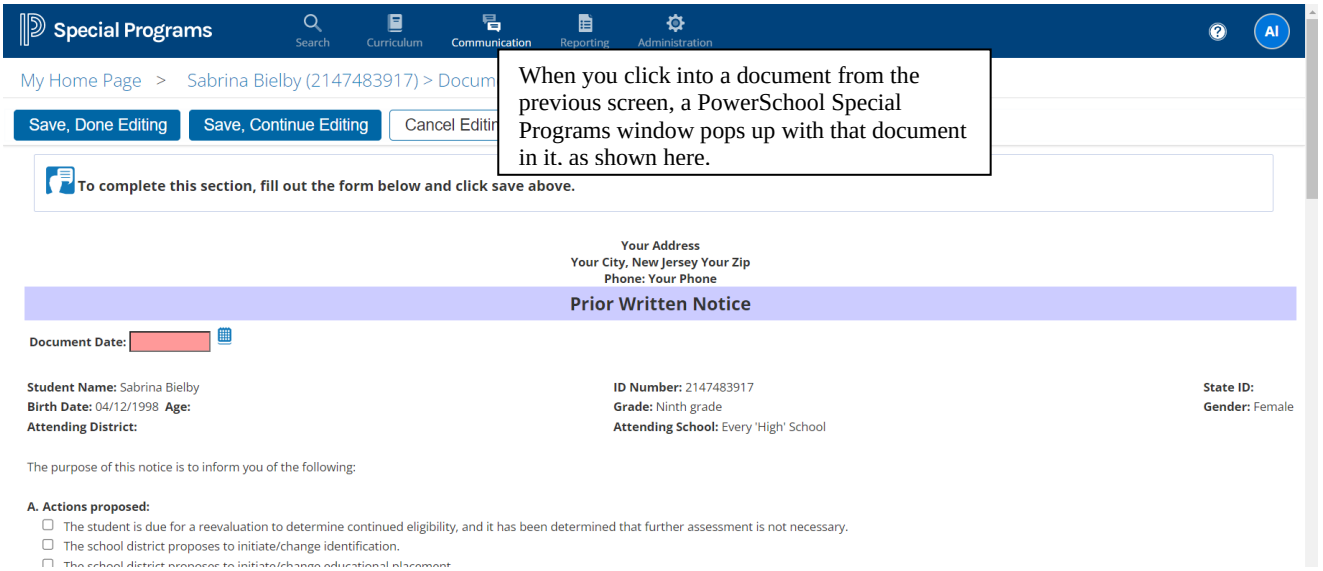
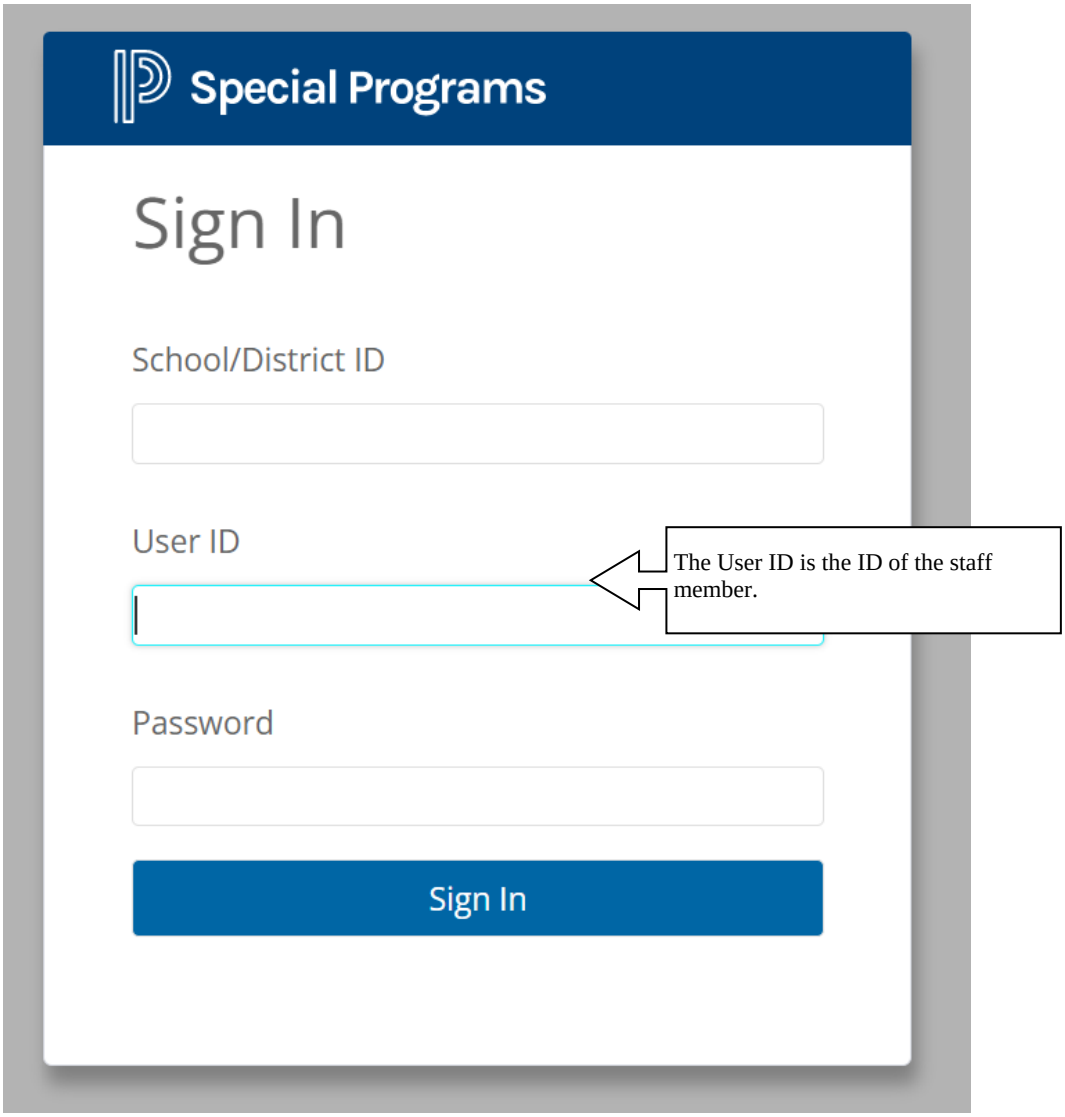
# ACCESSING POWERSCHOOL SPECIAL PROGRAMS



### PowerSchool Special Programs Login for Staff

This method is independent of PowerSchool SIS, and while it does require users to memorize another login ID and password, it may be useful as a redundant way for users to be able to sign into PowerSchool Special Programs directly when PowerSchool is unavailable. In this case, users have the option of going directly to the URL of the PowerSchool Special Programs server and logging in using the PowerSchool Special Programs login page.




### Parent Portal

As a Guardian, there are two methods to access PowerSchool Special Programs, one of which can be found within PowerSchool that will allow you to pass into PowerSchool Special Programs. The other allows parents to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directly access PowerSchool Special Programs using the PowerSchool Special Programs login page, as an alternative to the PowerSchool SIS Single Sign on

As a note, the Parent/Guardian users will only be able to see PowerSchool Special Programs documents if the security permissions have been granted to them. For more information on this, please refer to the "Enabling Student and/or Parent Logins" within the PowerSchool Special Programs Administration Guide.

### Parent Link to PowerSchool Special Programs Home page

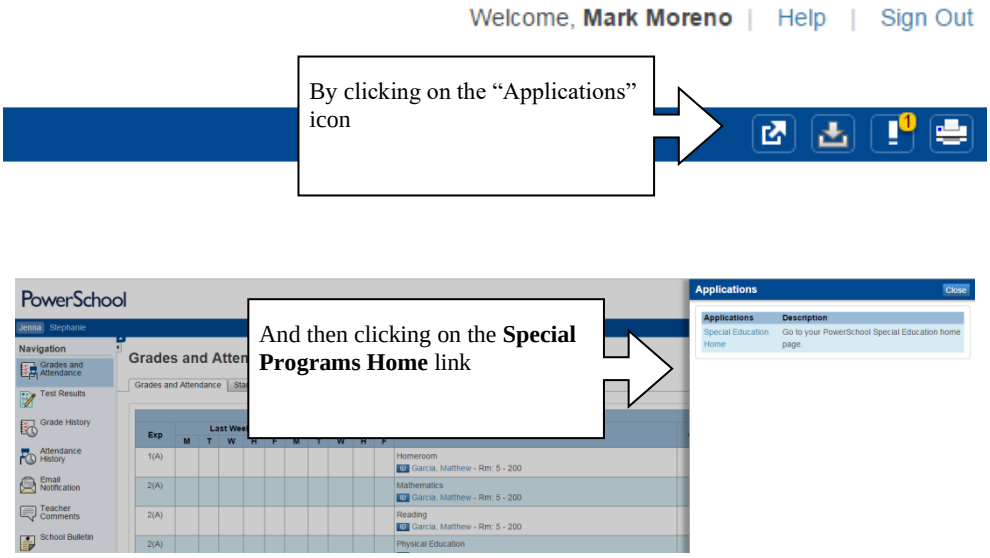
Within PowerSchool there is a link that will allow you to go to the PowerSchool Special Programs home page

In order to access PowerSchool in the context of a parent/guardian, the relevant URL must be used. Typically, in PowerSchool, this is done by using the following URL convention:

`https://schooldistrict.powerschool.com/public`

At which point you will be prompted for login credentials for a parent/guardian.

From your home page in PowerSchool SIS those links can be found:




### Parent PowerSchool Special Programs Login page

Alternatively, the user can also access PowerSchool Special Programs using the PowerSchool Special Programs login page as well. This method is independent of PowerSchool, and while it does require users to memorize another login ID and Password, it may be useful as a redundant way for parents/guardians to be able to sign into PowerSchool Special Programs directly when PowerSchool is unavailable. In this case, parents/guardians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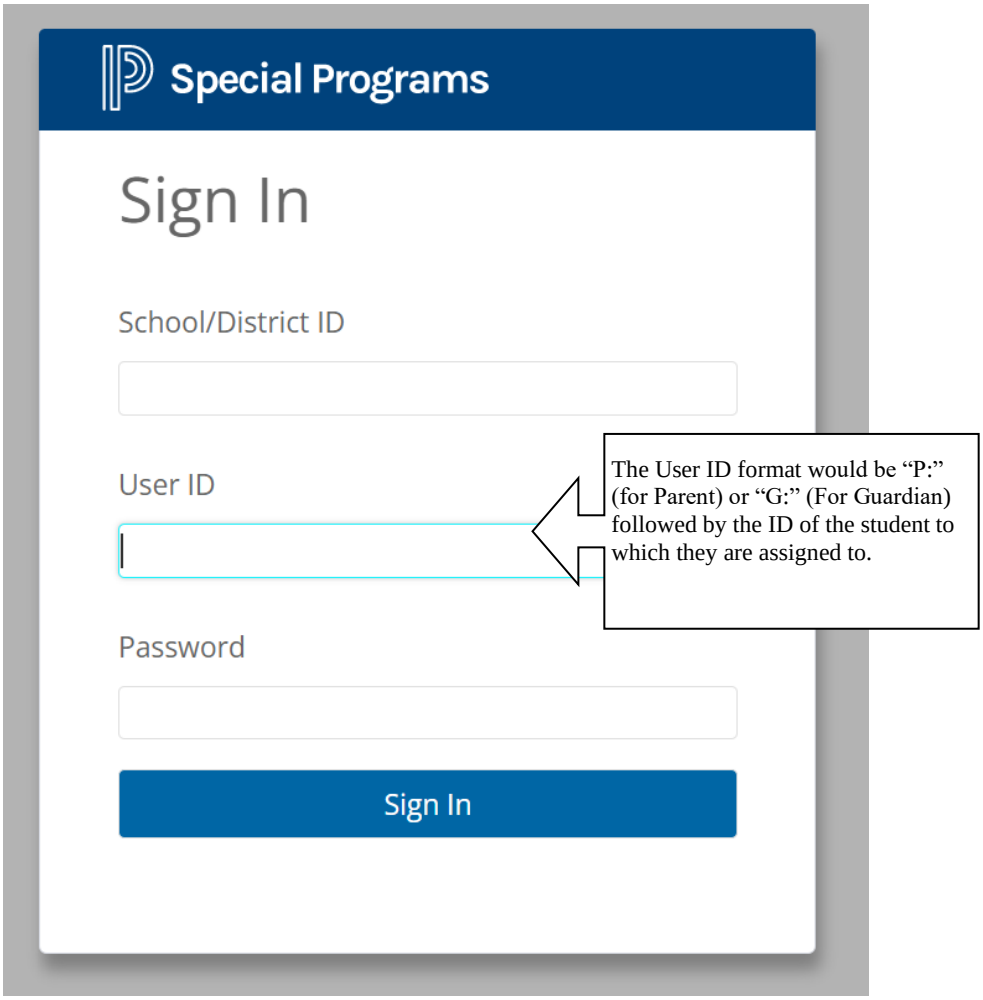
have the option of going directly to the URL of the PowerSchool Special Programs server and logging in using the PowerSchool Special Programs login page.

The User ID format would be the letter "P:" followed by the ID of the student to which they are assigned to for Parent logins. For Guardian logins, the letter "G:" would be substituted.




The User can type in the School/District ID, User ID, and Password.

For example, a Student ID of SMITH could have a parent login ID of "P:SMITH".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## Student Portal

As a Student, there are two methods to access PowerSchool Special Programs, one of which can be found within PowerSchool that will allow you to pass into PowerSchool Special Programs. The other allows students to directly access PowerSchool Special Programs using the PowerSchool Special Programs login page, bypassing PowerSchool's Single Sign on

As a note, the Student users will only be able to see PowerSchool Special Programs Documents if the security permissions have been granted to them. For more information on this, please refer to the "Enabling Student and/or Parent Logins" within the PowerSchool Special Programs Administration Guide.

## Student Link to PowerSchool Special Programs Home page

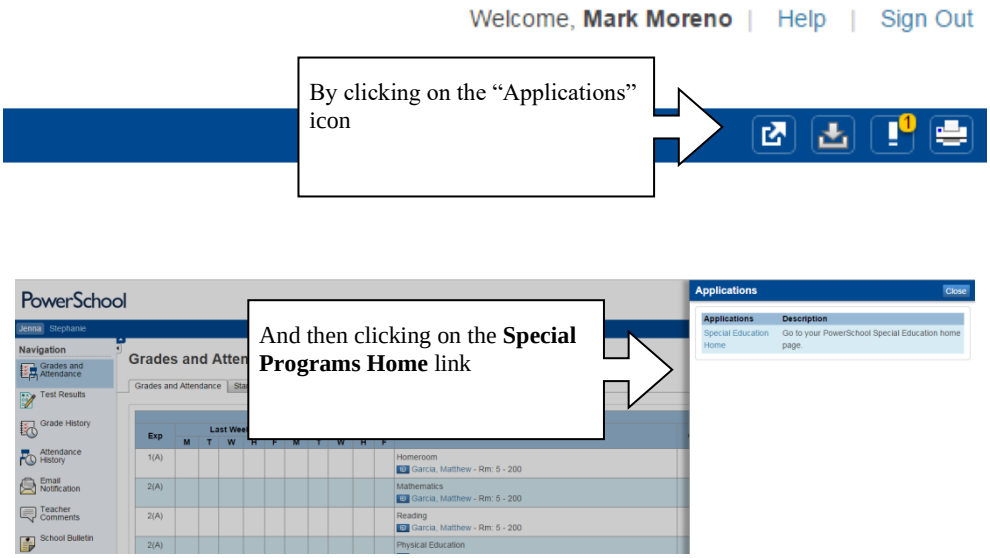
Within PowerSchool there is a link that will allow you to go into the home page for PowerSchool Special Programs.

In order to access PowerSchool in the context of a parent/guardian, the relevant URL must be used. Typically, in PowerSchool, this is done by using the following URL convention:

`https://schooldistrict.powerschool.com/public`

At which point you will be prompted for login credentials for a student.

From your home page in PowerSchool those links can be found:





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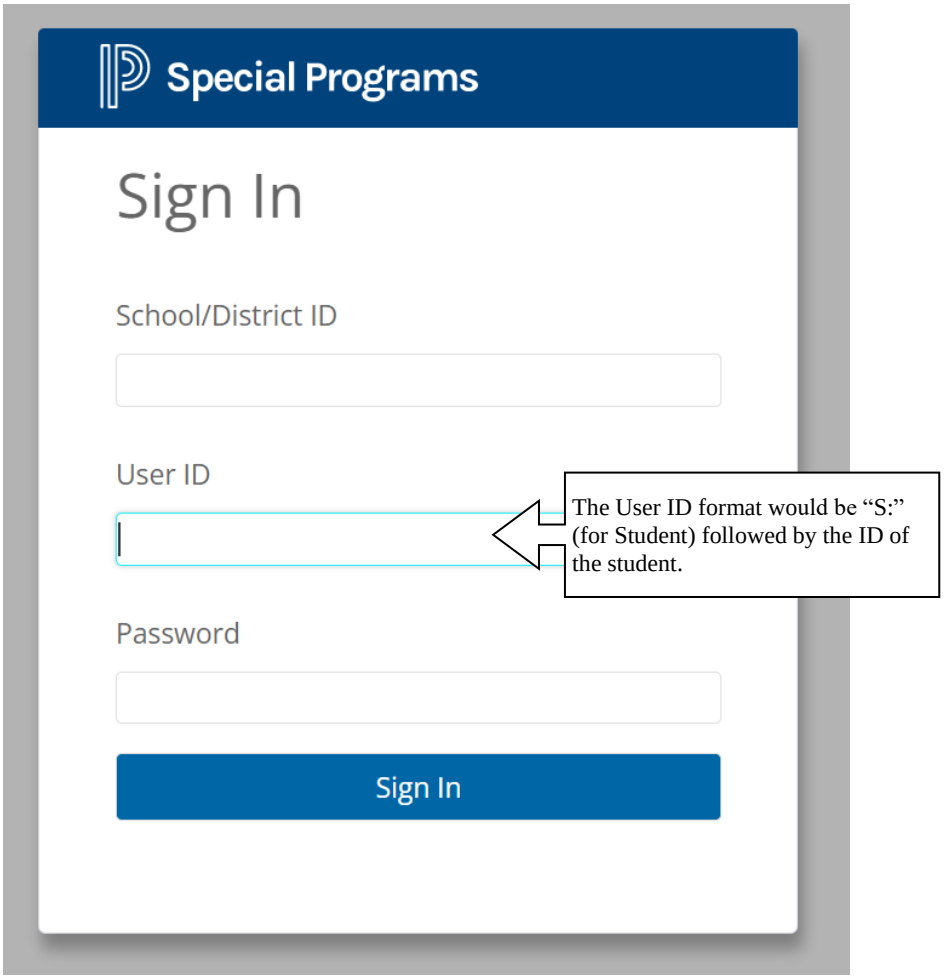
### Student PowerSchool Special Programs Login page

Alternatively, the user can also access PowerSchool Special Programs using the PowerSchool Special Programs login page. This method is independent of PowerSchool SIS, and while it does require users to memorize another login ID and Password, it may be useful as a way for students to be able to sign into PowerSchool Special Programs directly when PowerSchool SIS is unavailable. In this case, students have the option of going directly to the URL of the PowerSchool Special Programs server and logging in using the standard login page.

The User ID format would be the letter "S:" followed by the ID of the student.




The User can type in the School/District ID, User ID, and Password.

For example, a Student ID of SMITH would have a login ID of "S:SMITH".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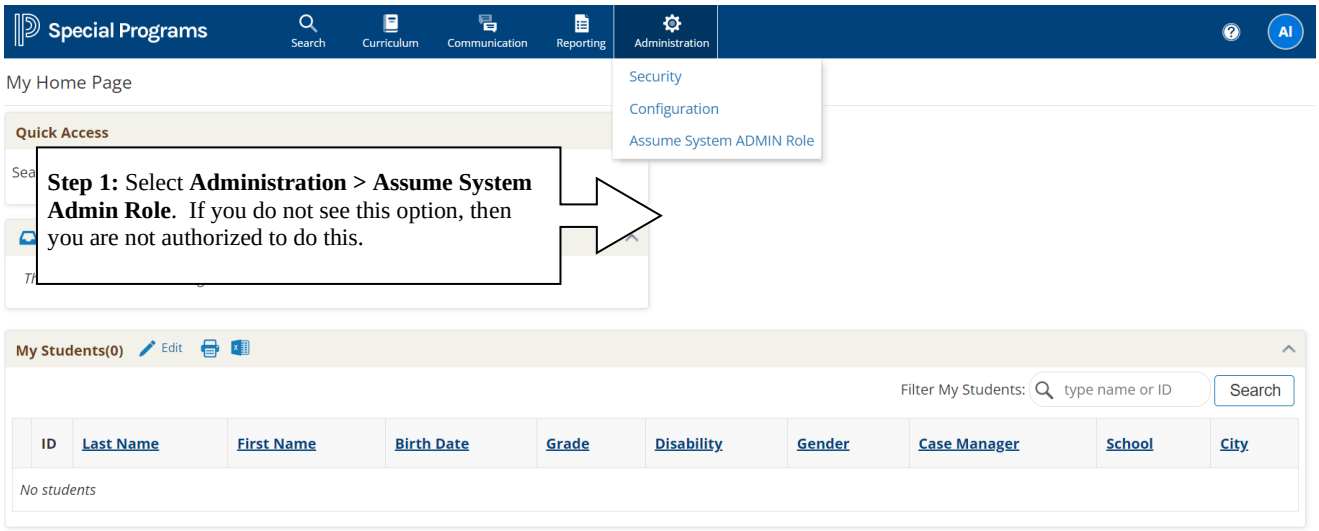
Chapter 3

# Data Flow between PowerSchool SIS and Special Programs

## Viewing Import Layouts

For data integration, PowerSchool Special Programs utilizes "import layouts" for each type of information that it receives from PowerSchool (e.g. Students, Sections/Classes, Staff, etc). These import layouts contain information about the "mapping" of fields in PowerSchool to fields in PowerSchool Special Programs.

Follow the steps below to access and view the import layouts:



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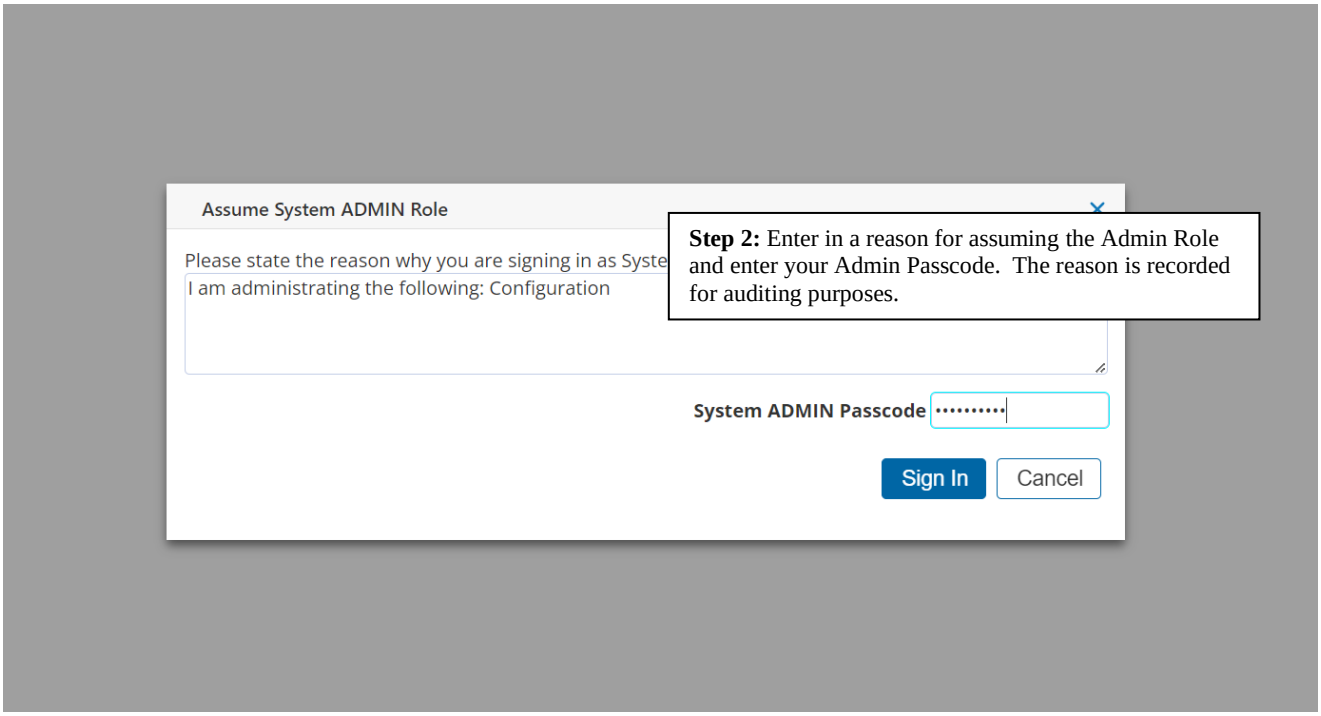


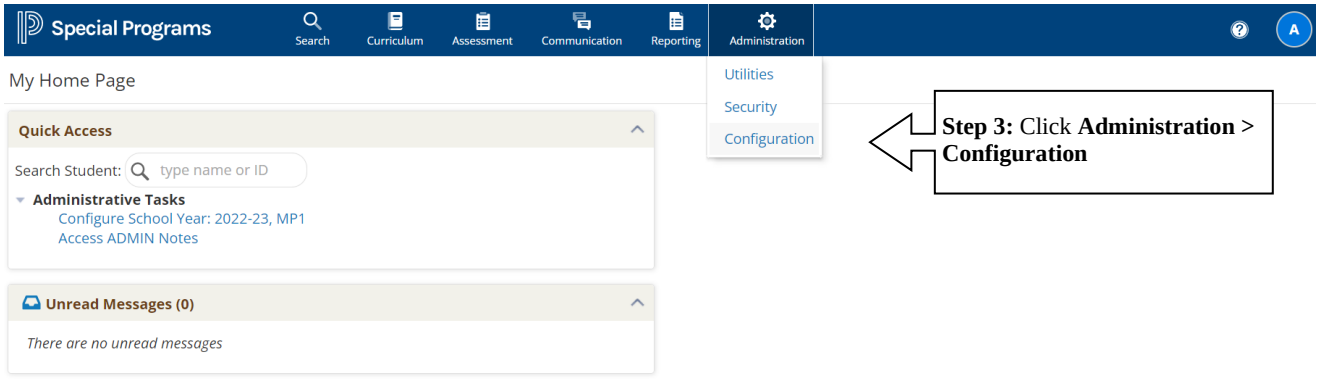


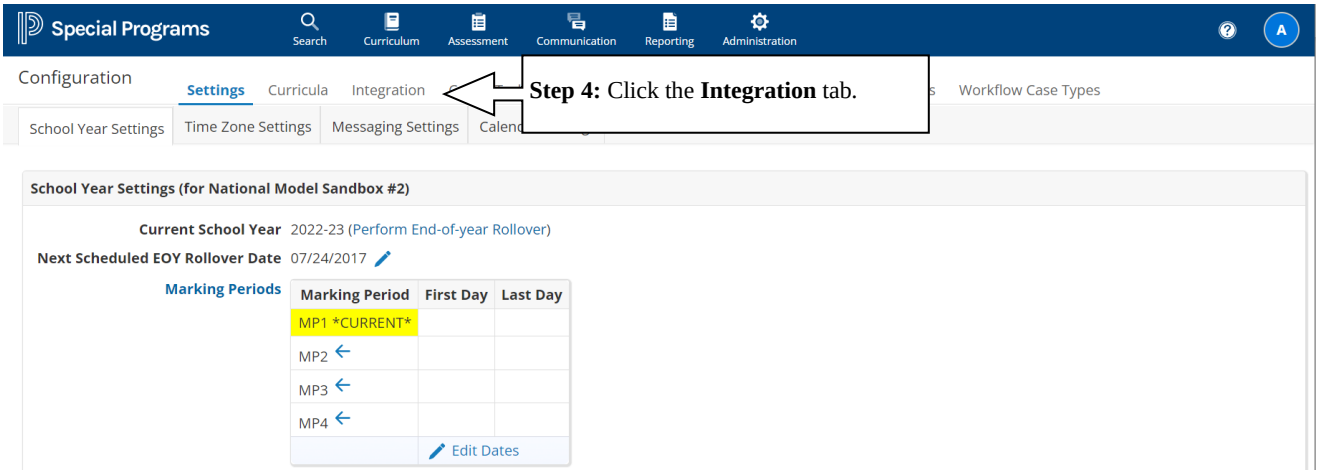



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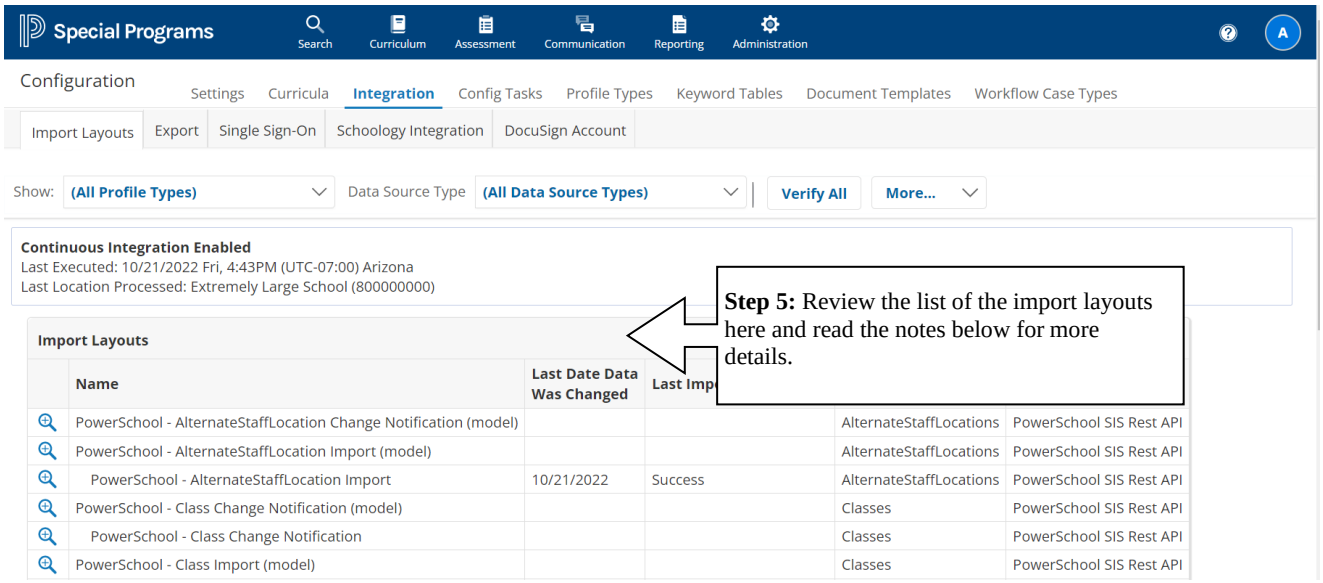
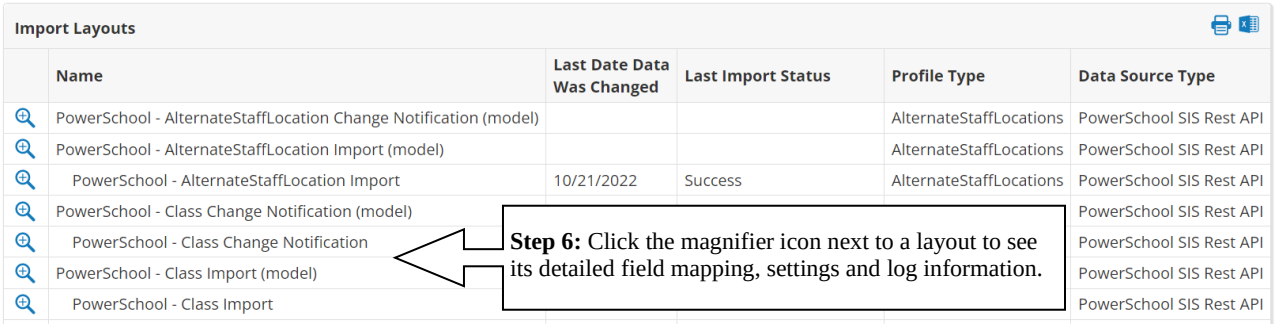



PowerSchool Special Programs typically has two import layouts for each type of information being imported from PowerSchool:

1. **Continuous Import Layouts:** These layouts are used for the initial population of the PowerSchool Special Programs database as well as regular comprehensive rolling updates that occur during "off-peak" hours.

2. **Change Notification Import Layouts:** These are used for "change notification" events where PowerSchool notifies PowerSchool Special Programs that an individual record has been added or updated allowing PowerSchool Special Programs to pick up that change in near real time. Additionally, this type of import layout is also used to support users manually updating specific records on demand, which will be discussed later in this section. You can distinguish this type of layout from the other because they typically have "Change Notification" in the name of the layout as seen in the screen above.

By navigating into an import layout, you can view what fields from PowerSchool Special Programs are being populated upon the imports and view the logs for these imports.





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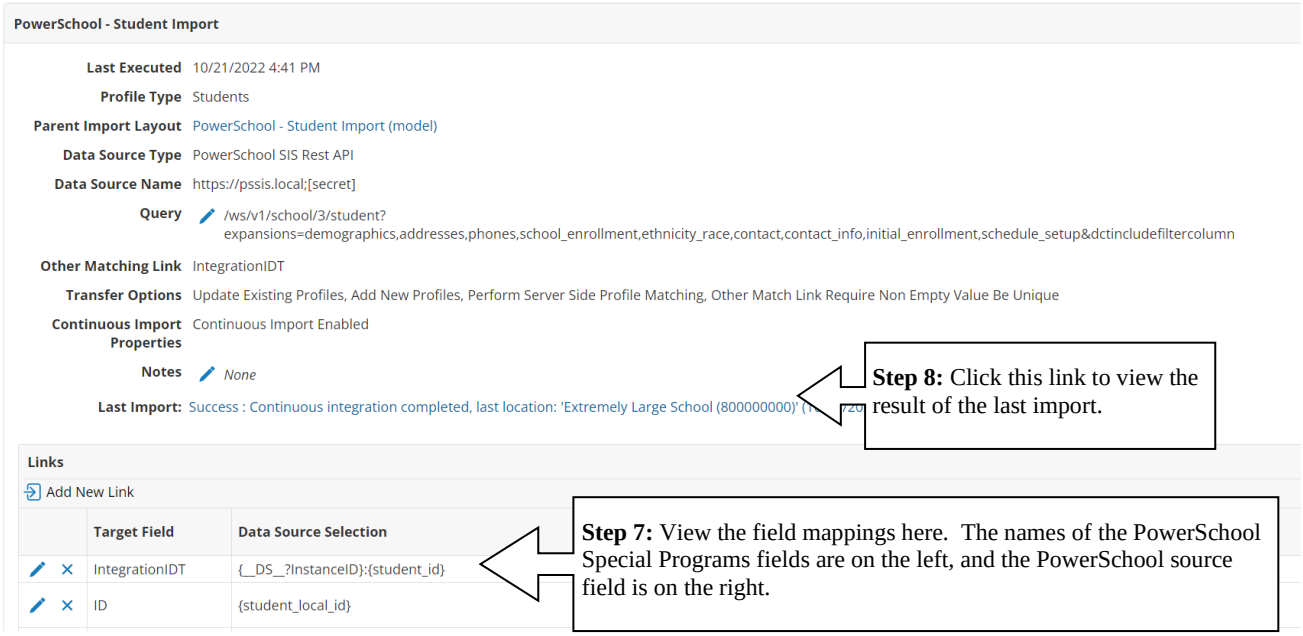



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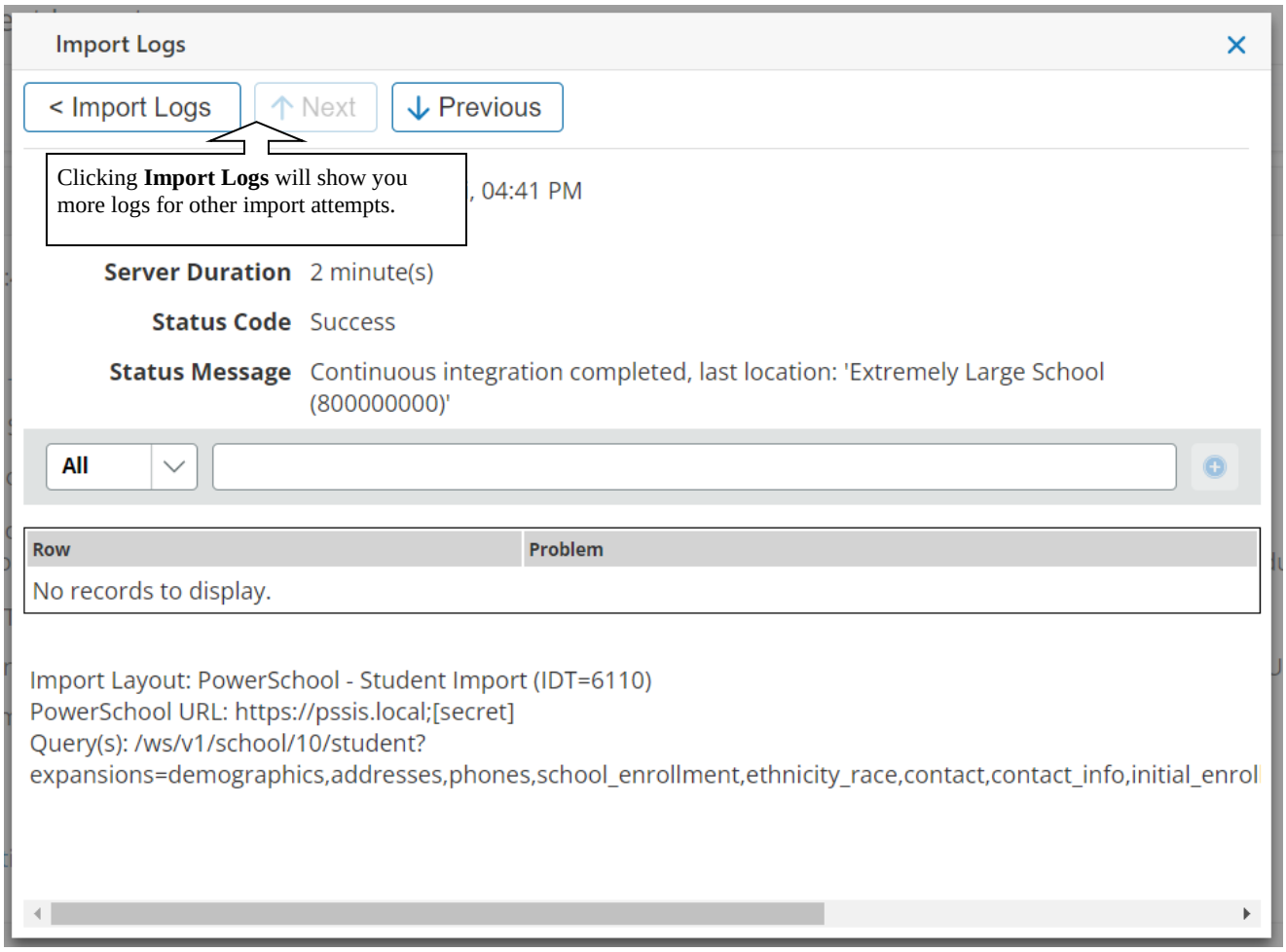



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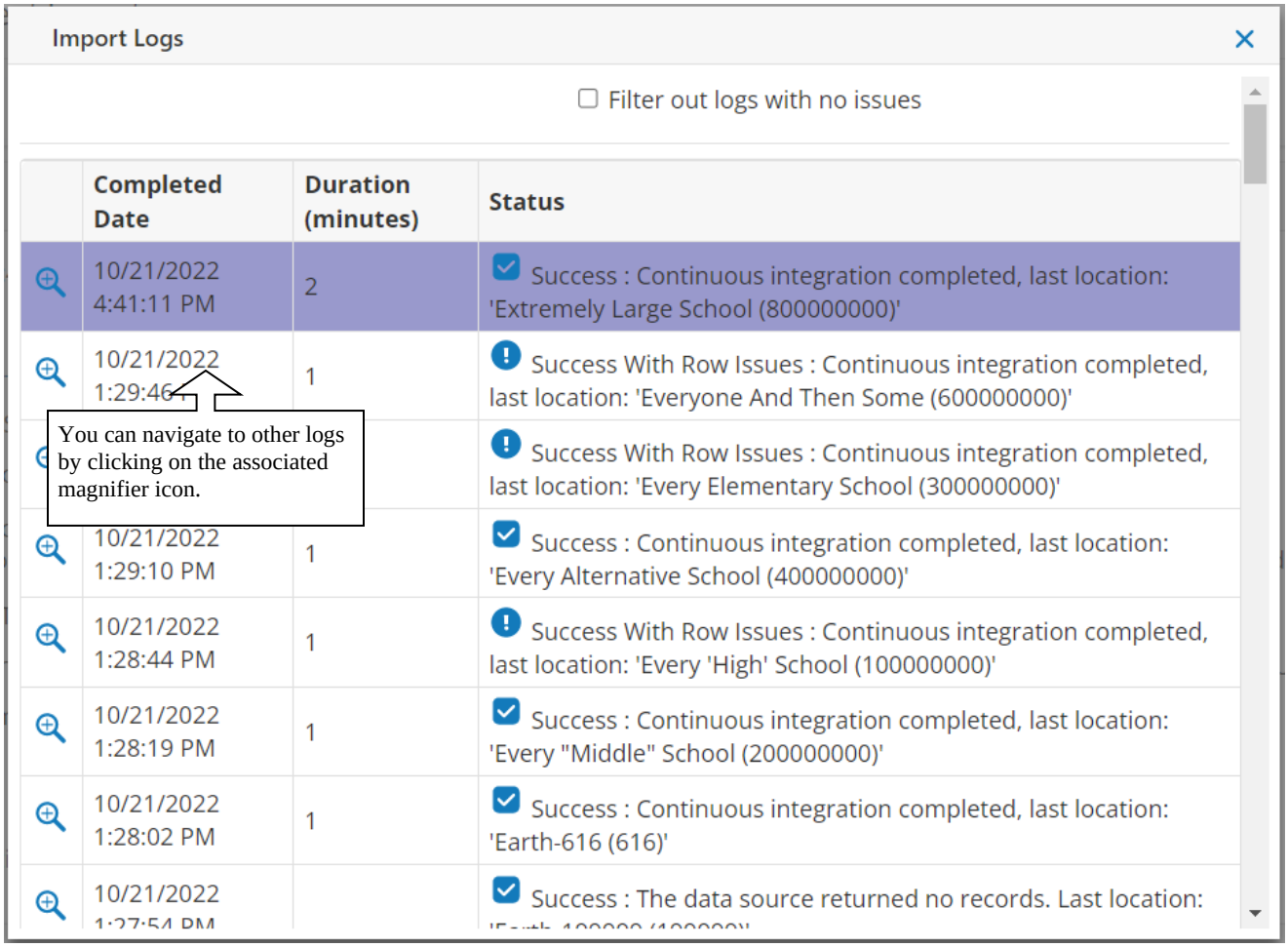


For each import, the overall result will be one of the following:

1. **Failed Imports:** These imports are instances where data did not successfully import in. Issues such as being unable to connect to the server, incorrect Client ID or Client Secret, or the data that was read not being compatible with what PowerSchool Special Programs expects are a few examples of Failed Imports. As a result, the attempt was terminated, and no data was committed into PowerSchool Special Programs.

2. **Success with Row Issues:** These imports completed, and data was updated, but there are some rows that could not be imported due to invalid data, or constraints were in place that prevented those particular rows from completing.

3. **Successful Imports:** Data was imported without any issues.


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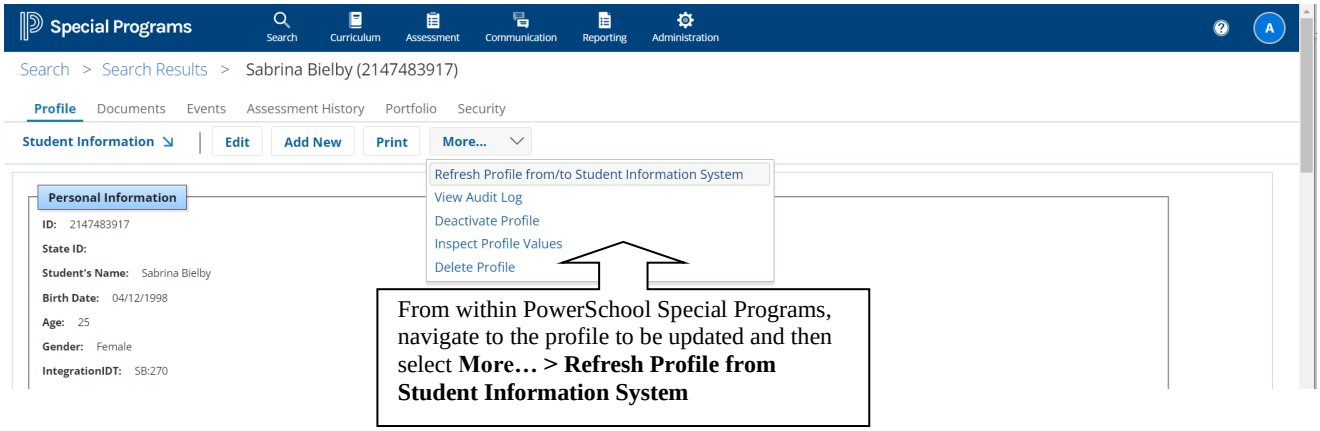
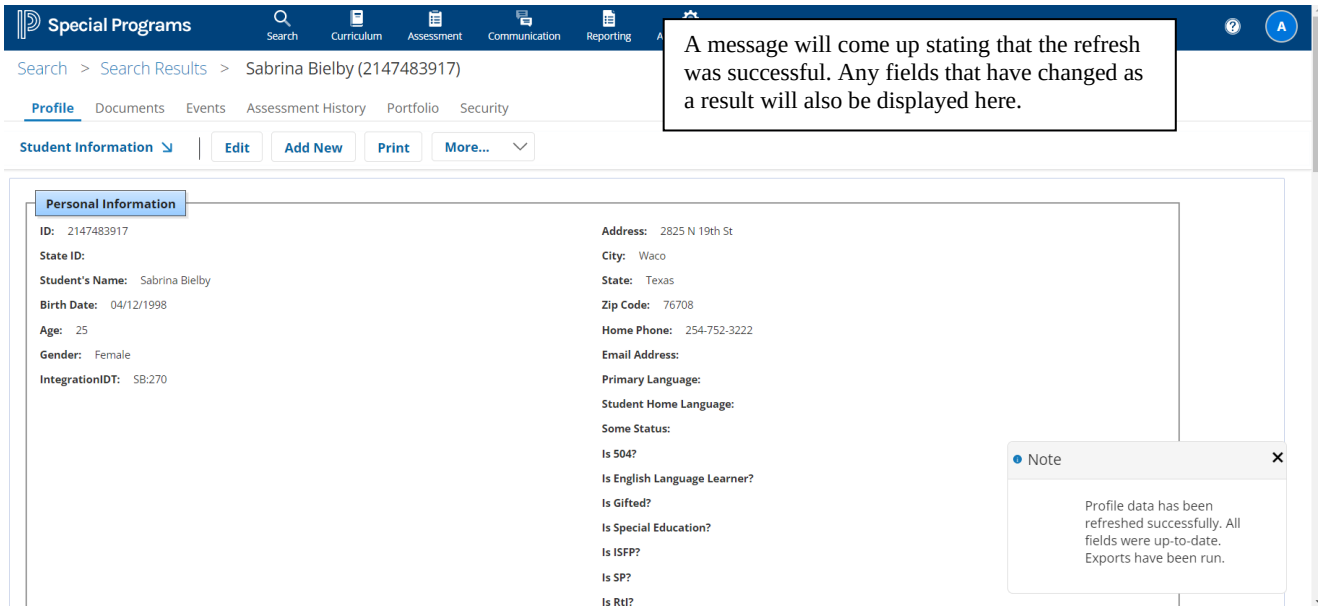
## Manually Updating a Record from PowerSchool

In the event that a relevant data modification in PowerSchool did not make it across to PowerSchool Special Programs yet, or a user wishes to ensure that the most recent data from PowerSchool is in PowerSchool Special Programs at the current time, a manual update can be performed from within PowerSchool Special Programs, as shown below:




## Ignoring Locations for Import

It is not uncommon for districts to have schools entered in the SIS that are no longer active (closed) or only active at some parts of the year (summer schools). For processing efficiency, it makes sense to not process these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locations all the time. A district can configure a custom field on locations named **IgnoreForIntegration** that is a logical value (data or calculated) that, when present, the integration will use to determine if the location should be processed.

For example, to handle the closed schools scenario a simple solution is to add a logical value data field named **IgnoreForIntegration** that, when checked, indicates the location should not be processed.

To handle the summer school scenario, a calculated field can be introduced, named **IgnoreForIntegration**, that returns true if the current date is not in the summer and the school is a summer school.


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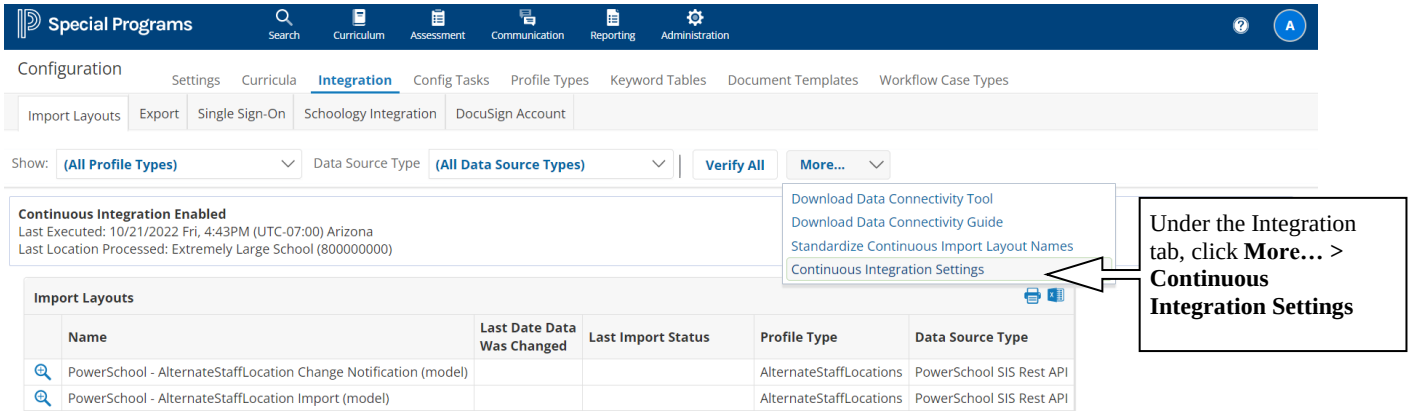
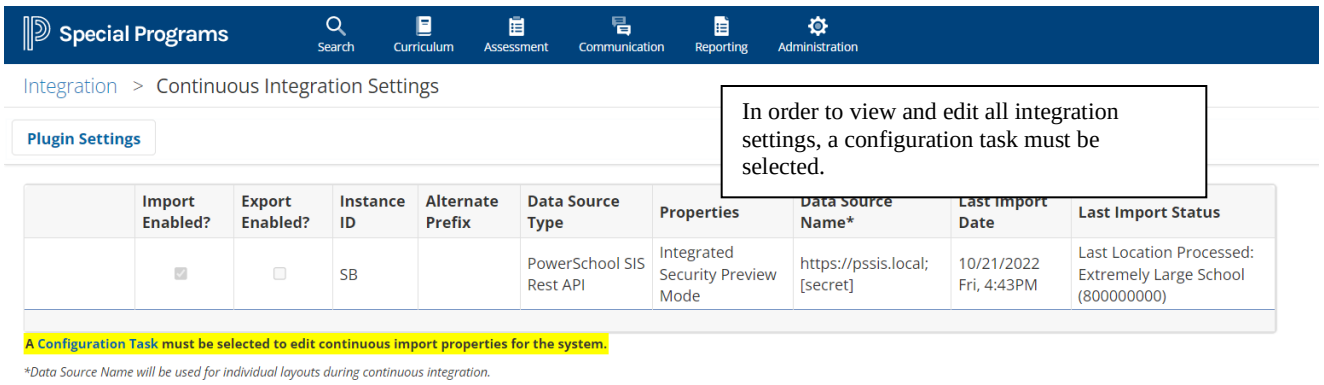
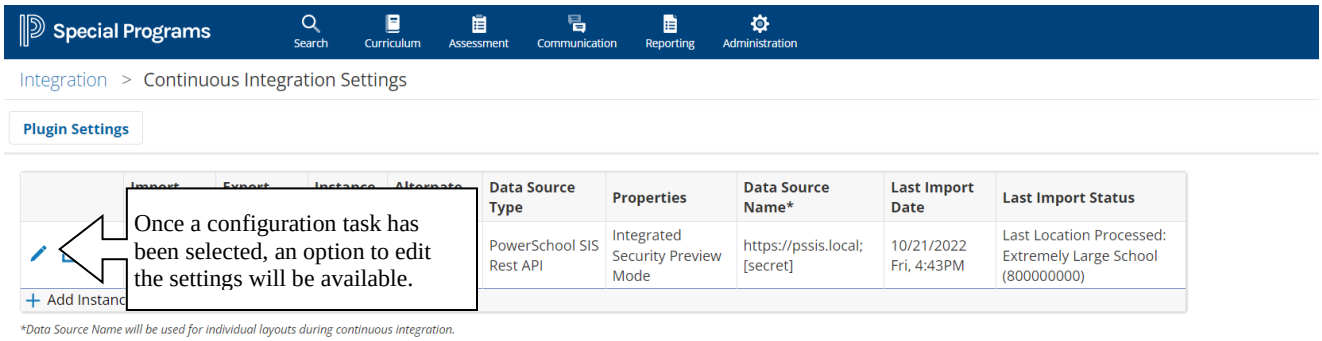
# Continuous Integration Settings

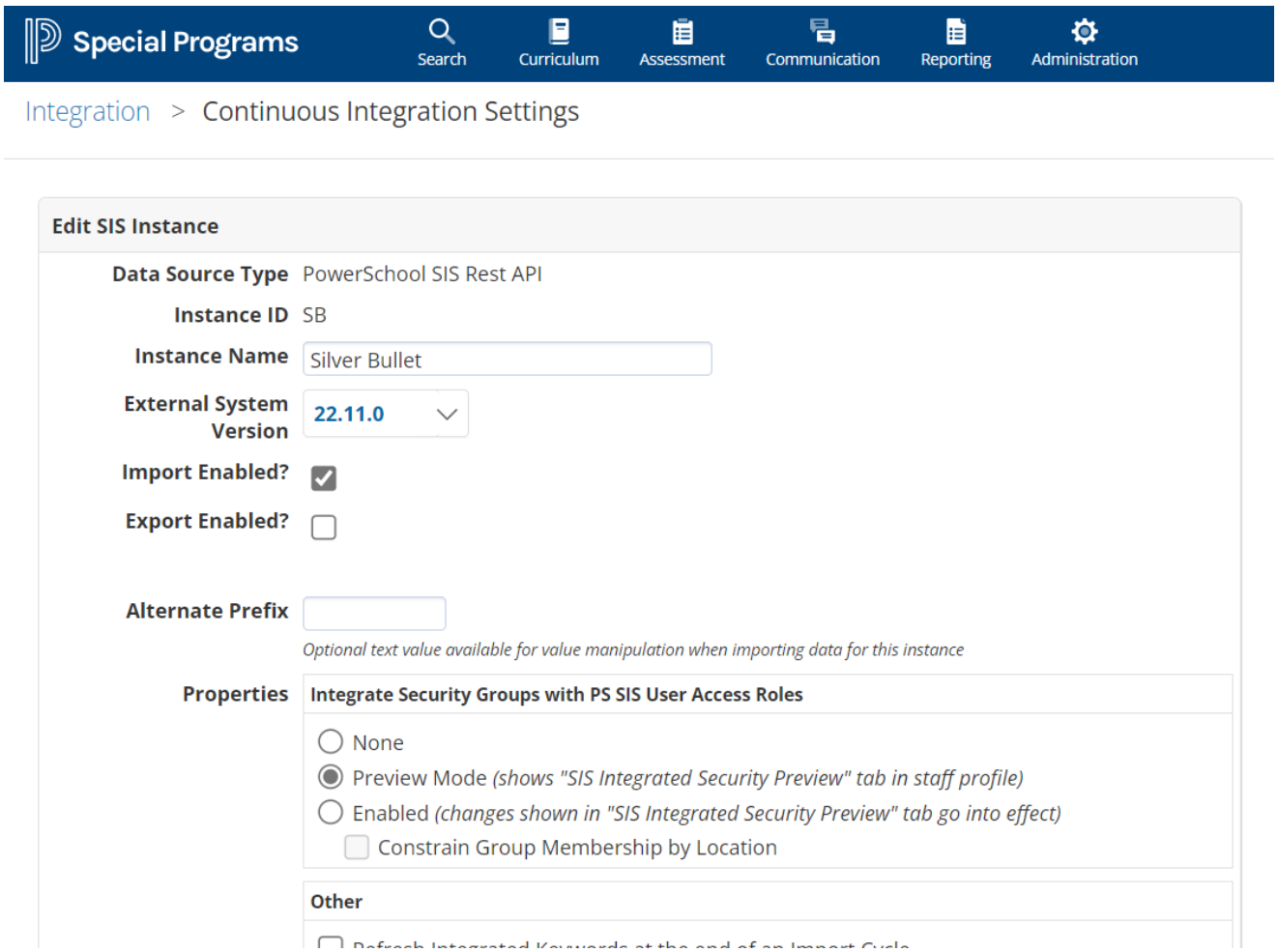
Chapter 4

Additionally, you can set options for the Integration Layout.







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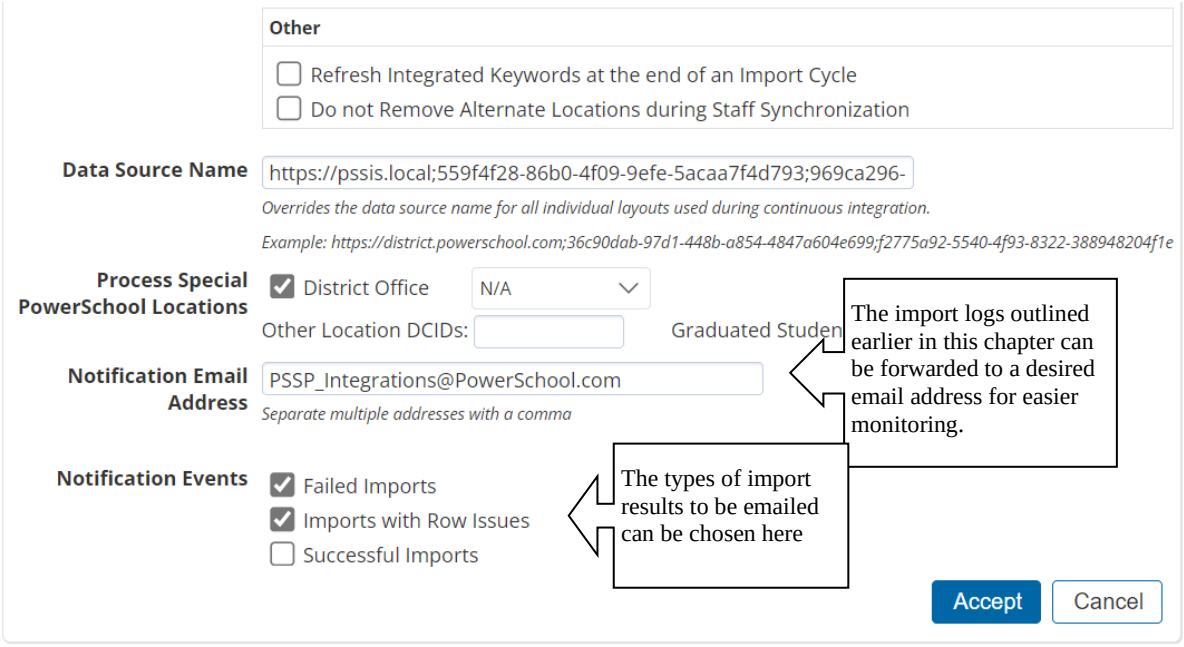



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# Security

Chapter 5

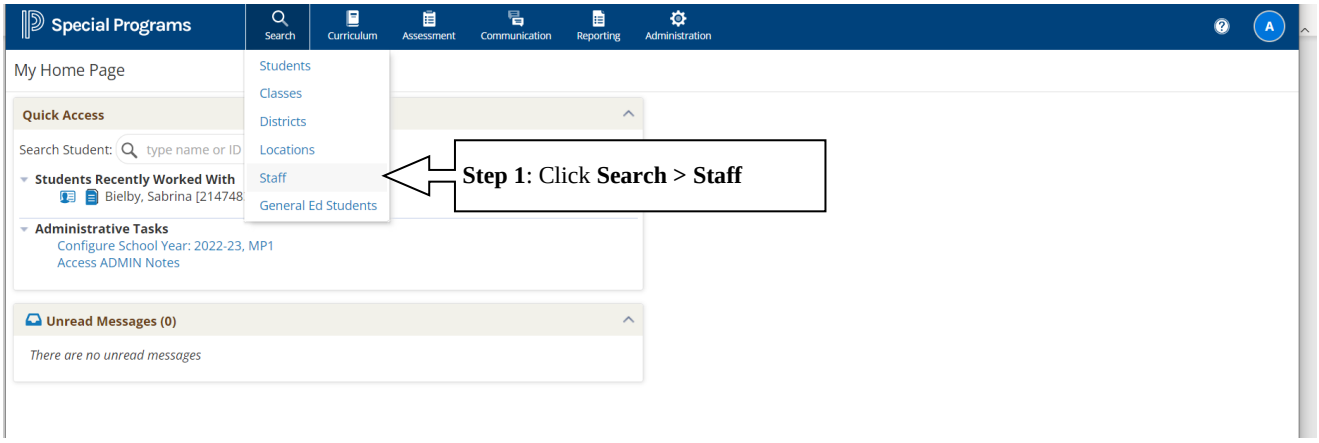
*This section describes how security and single sign-on works in the context of the integrated systems.*

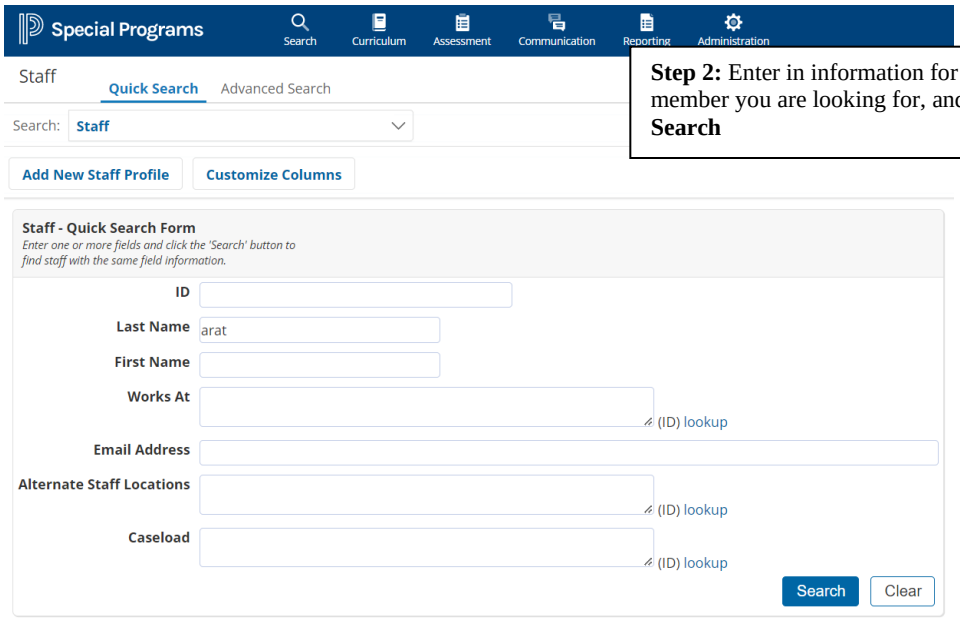
## Summary Single Sign On

In order to establish a Single Sign On experience, PowerSchool Special Programs and PowerSchool SIS use the OpenID protocol for authentication purposes. PowerSchool SIS acts as an identity provider (IdP), PowerSchool Special Programs relies on this identity provider so that the user does not need to log into PowerSchool Special Programs separately. In order for this to work, the user that is logged into PowerSchool must also exist in PowerSchool Special Programs with the correct OpenID information, which would have previously been imported into PowerSchool Special Programs via the data integration process.

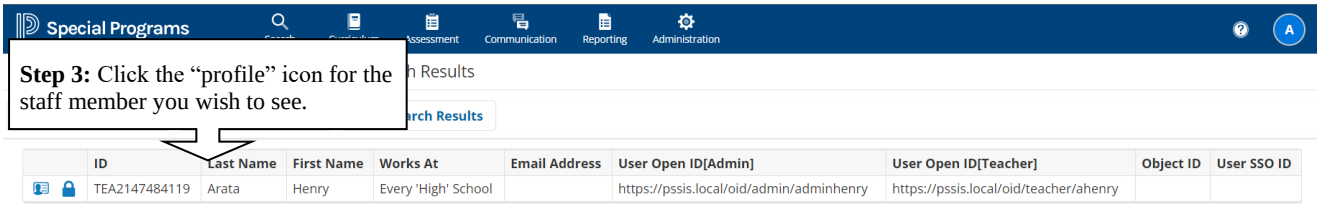
## Single Sign On for Staff

A staff's Single Sign On credentials can be found on their staff profile within PowerSchool Special Programs.






**Step 2:** Enter in information for the staff member you are looking for, and then click **Search**




**Step 3:** Click the "profile" icon for the staff member you wish to see.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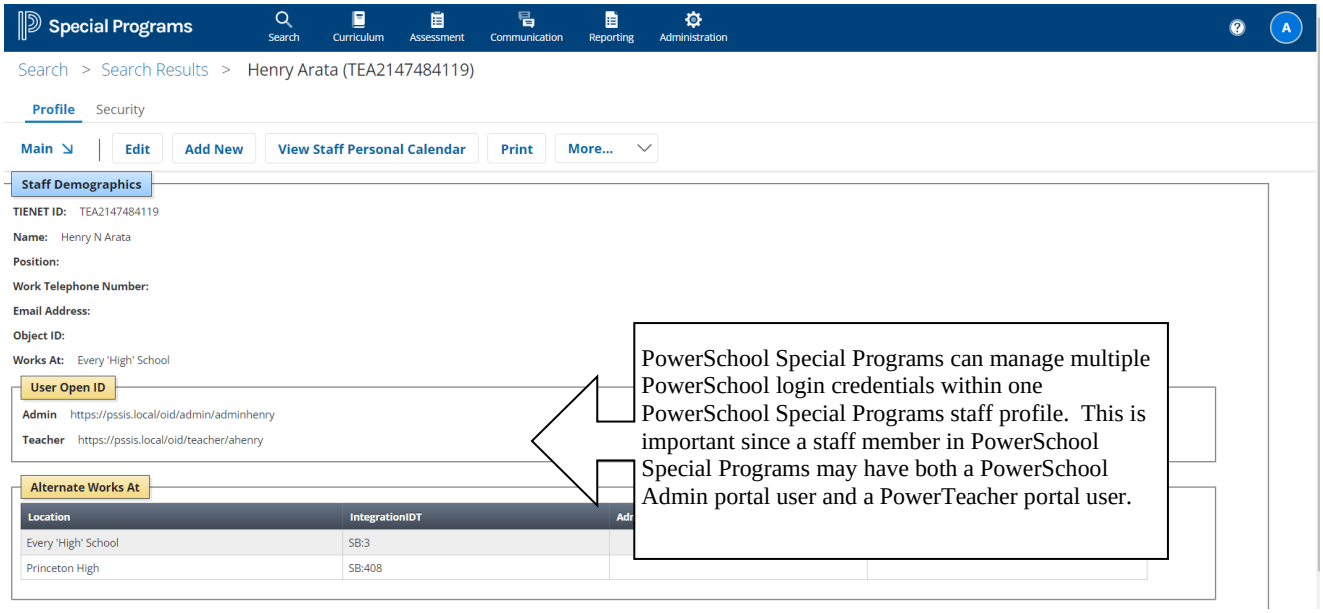
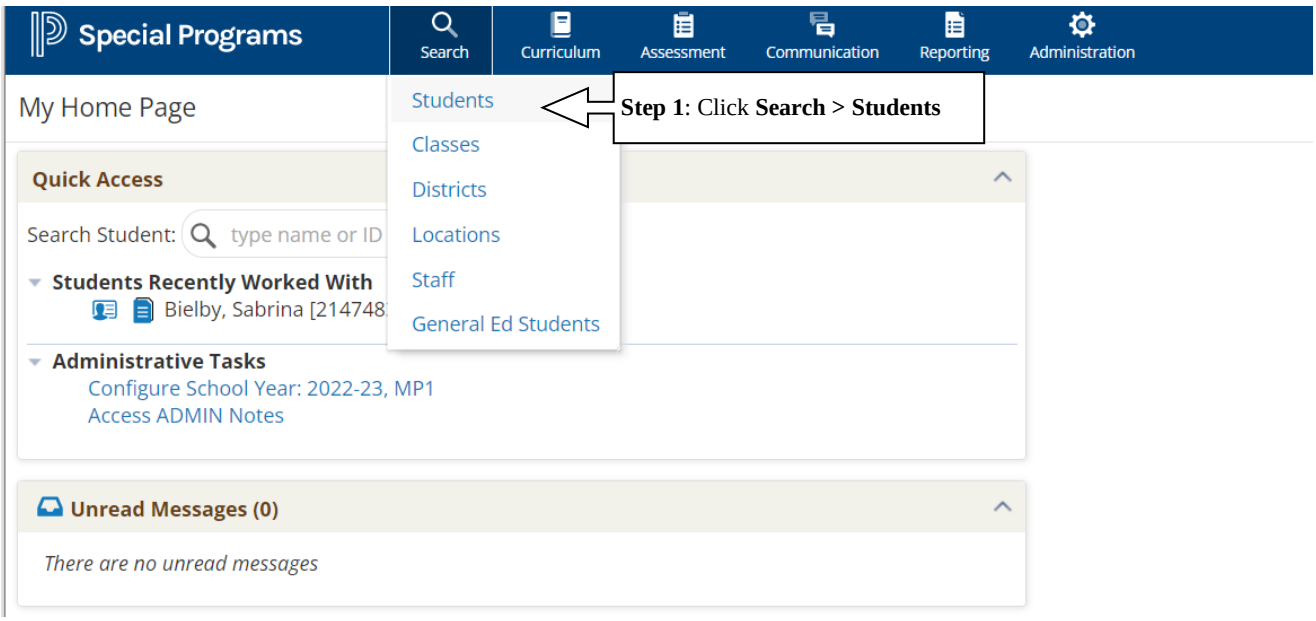



## Single Sign On for Parents/Guardians

A Parent's Single Sign On credentials can be found on the profile of a Student to which they are associated with in PowerSchool SIS.





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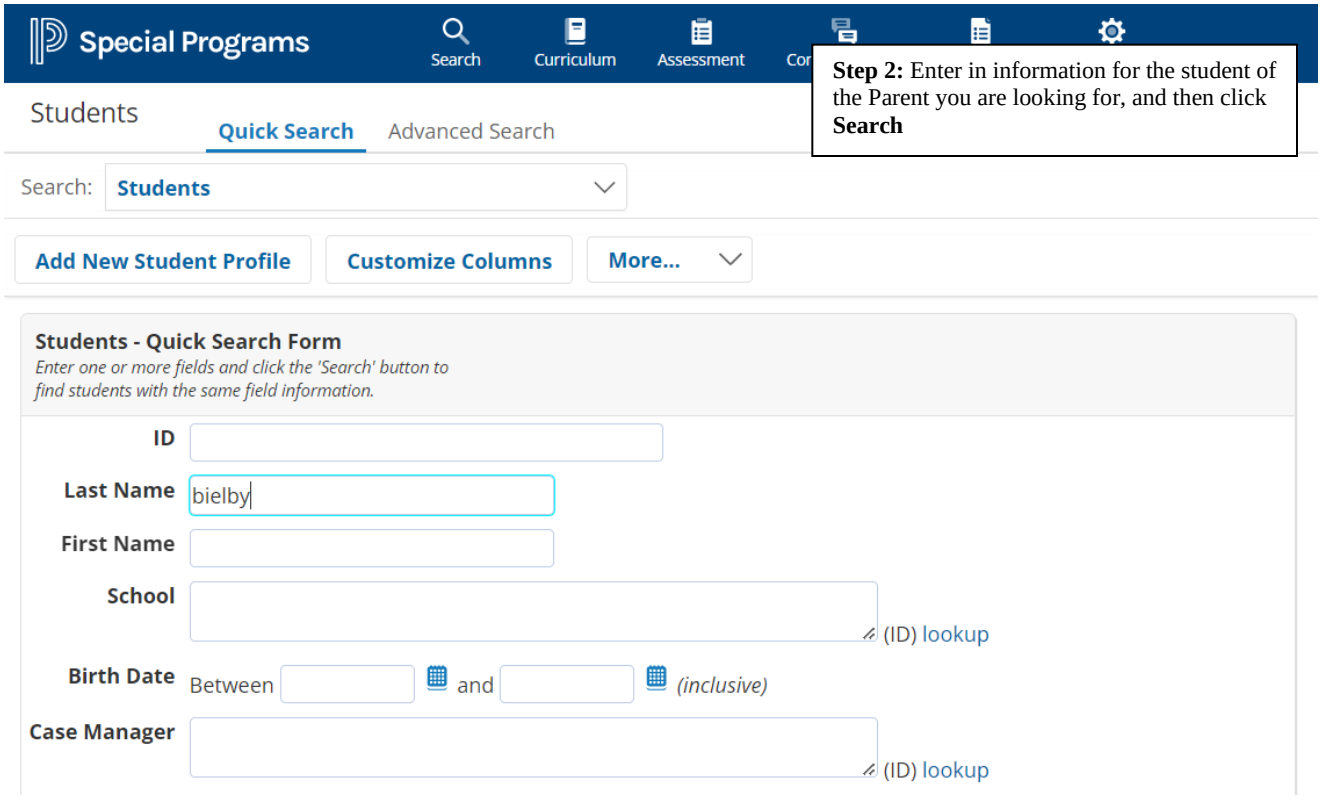
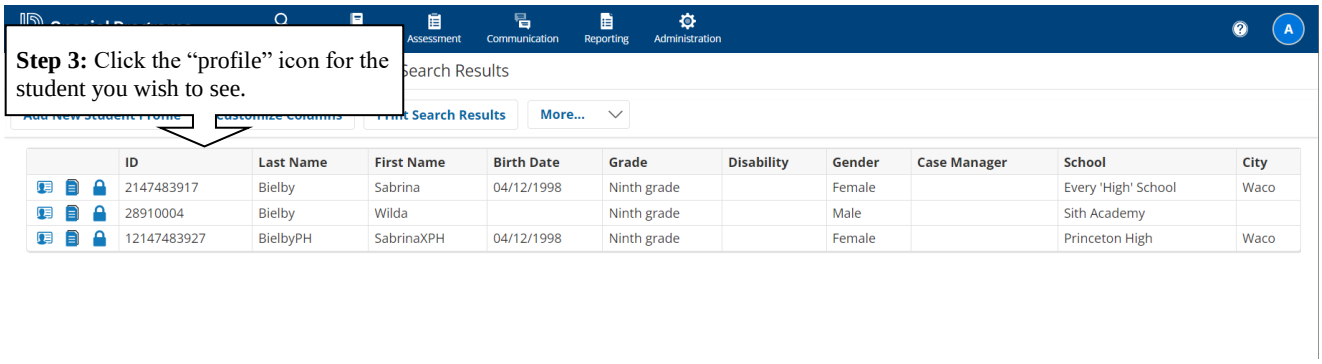



**Step 2:** Enter in information for the student of the Parent you are looking for, and then click **Search**




**Step 3:** Click the "profile" icon for the student you wish to see.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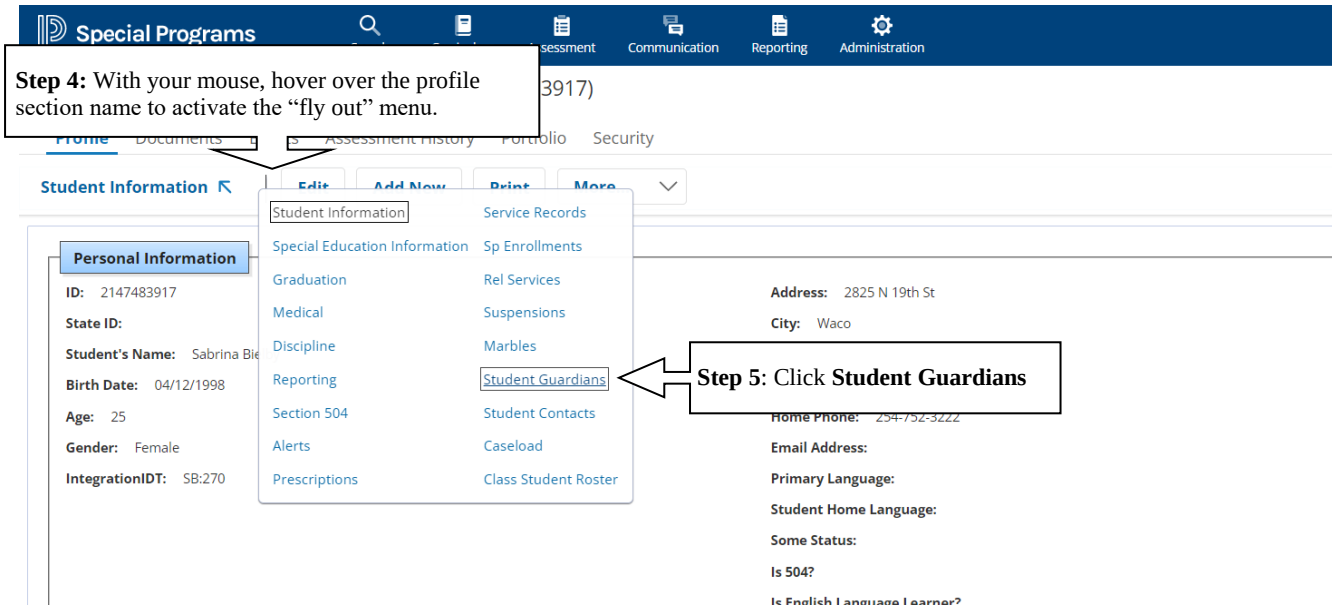


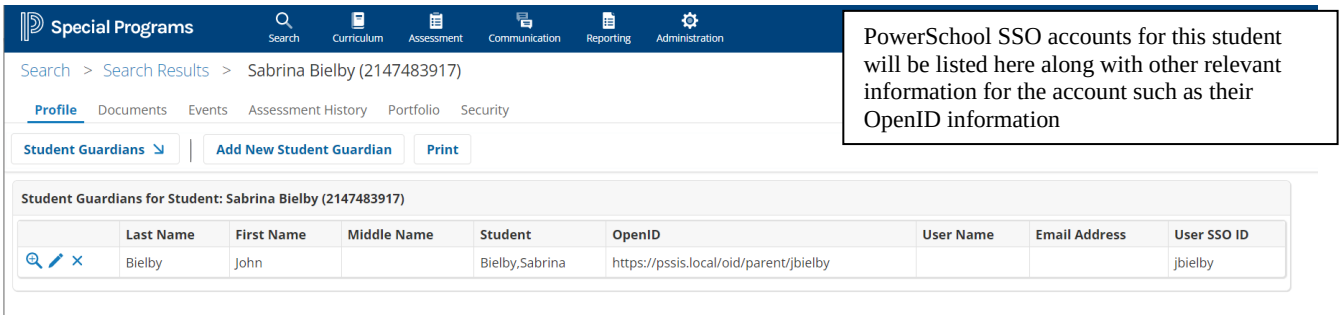


## Dual Access Credentials

If PowerSchool SIS is unavailable, unless otherwise configured, PowerSchool Special Programs will be unreachable as well, since traditional Single Sign On relies on users signing into PowerSchool first in order to access PowerSchool Special Programs.

Dual Access allows users to access PowerSchool Special Programs directly, thereby bypassing PowerSchool's login method, and using a separate set of credentials to log into PowerSchool Special Programs.

## Staff Dual Login

For staff to log into PowerSchool Special Programs, the ability to do so must be configured by a configuration specialist. If you are unsure if this is done, please consult your PowerSchool Special Programs representative.


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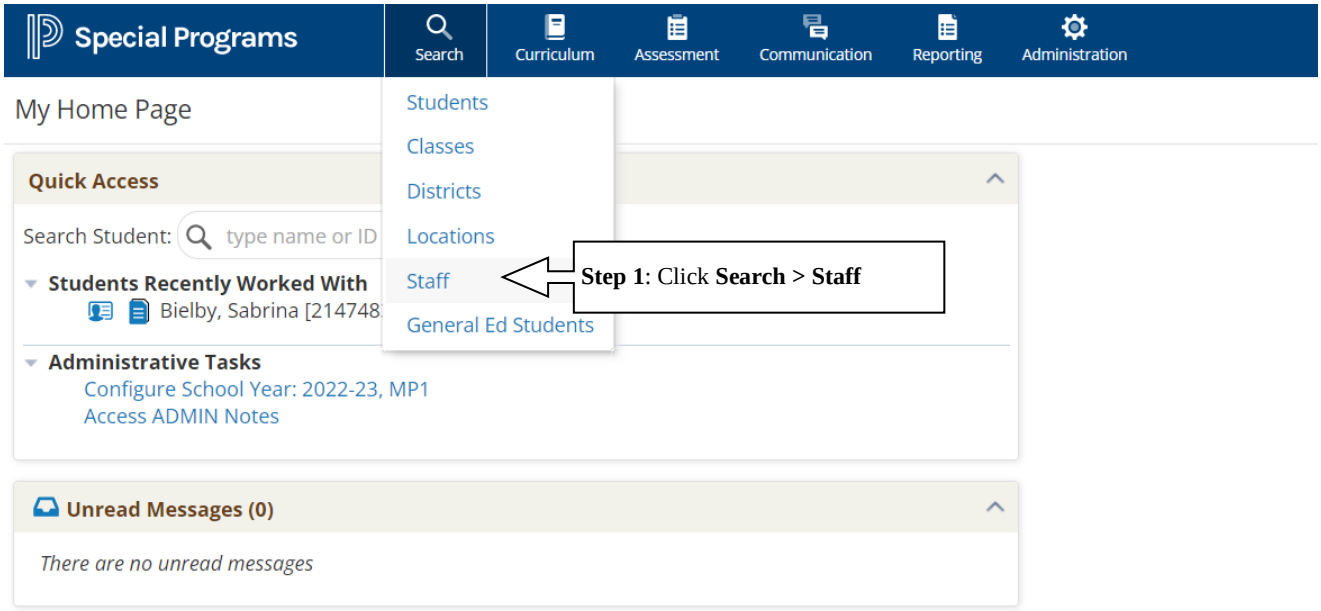
Once this has been configured, within PowerSchool Special Programs, each staff's profile must be enabled to take advantage of this feature. This can be done either on an individual basis, or by security groups.

### Individually Assigning PowerSchool Special Programs Credentials





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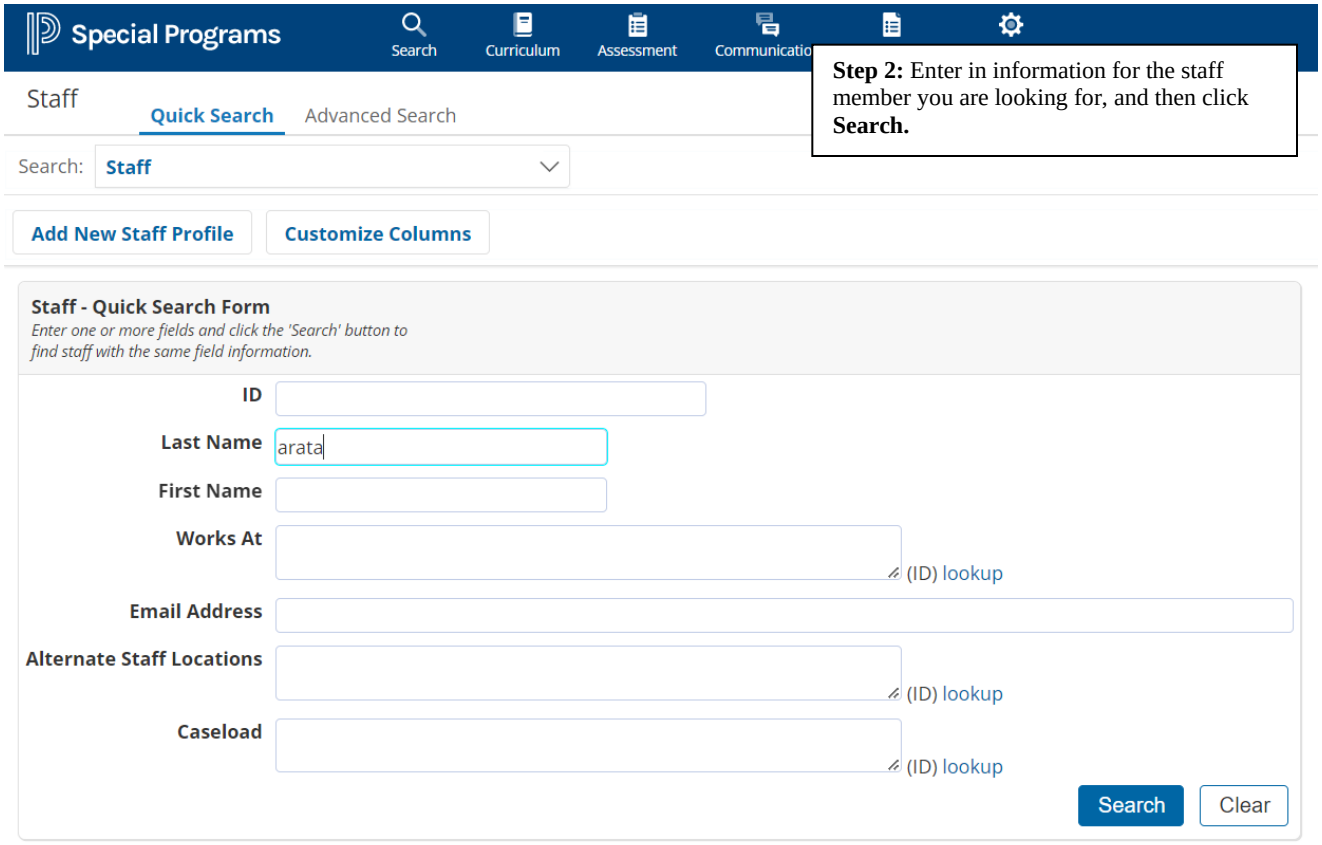


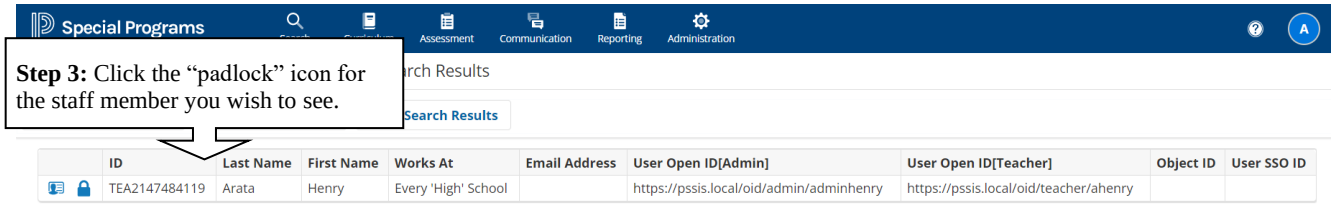



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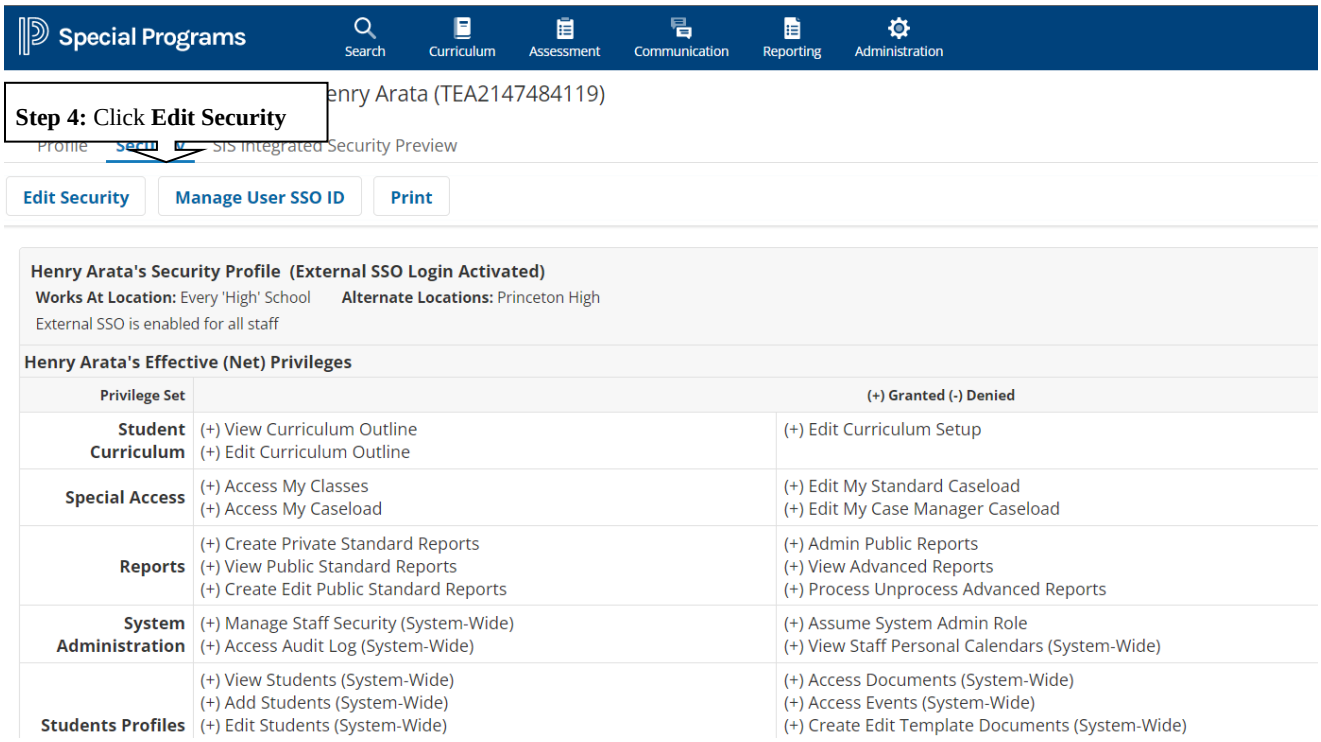


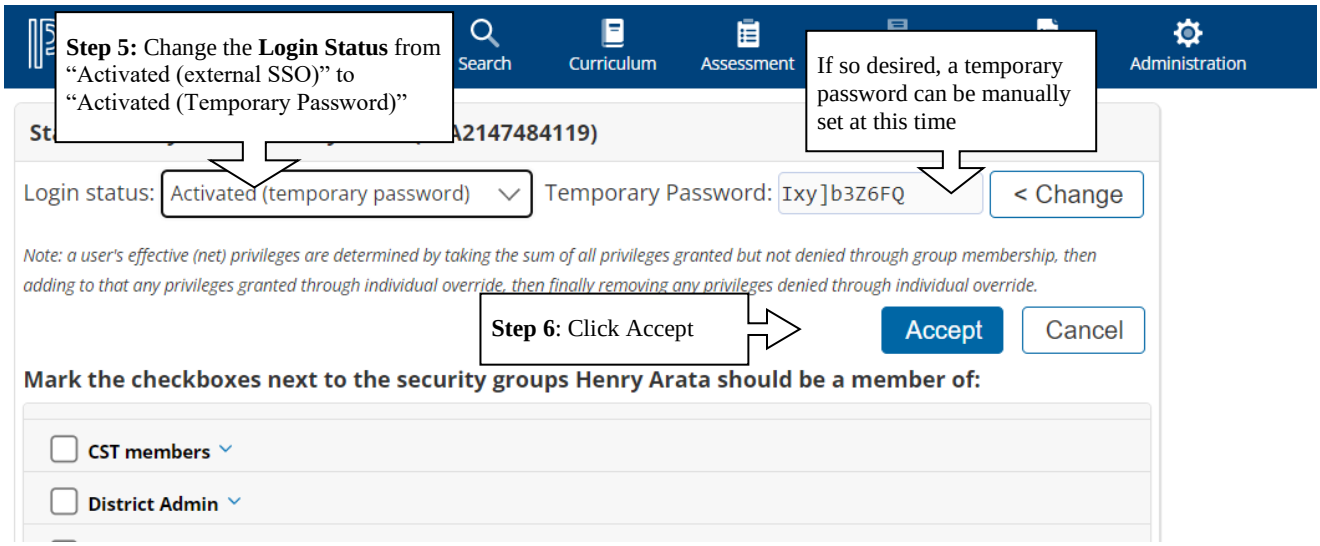


It is at this time that the user can login to the front end of PowerSchool Special Programs and set their permanent PowerSchool Special Programs password with the temporary password that was provided.

As a note, PowerSchool Special Programs does not recognize that the user is "Active" in PowerSchool Special Programs until the user has set their permanent password. This means that PowerSchool's Single Sign on into PowerSchool Special Programs will not work until this is done.


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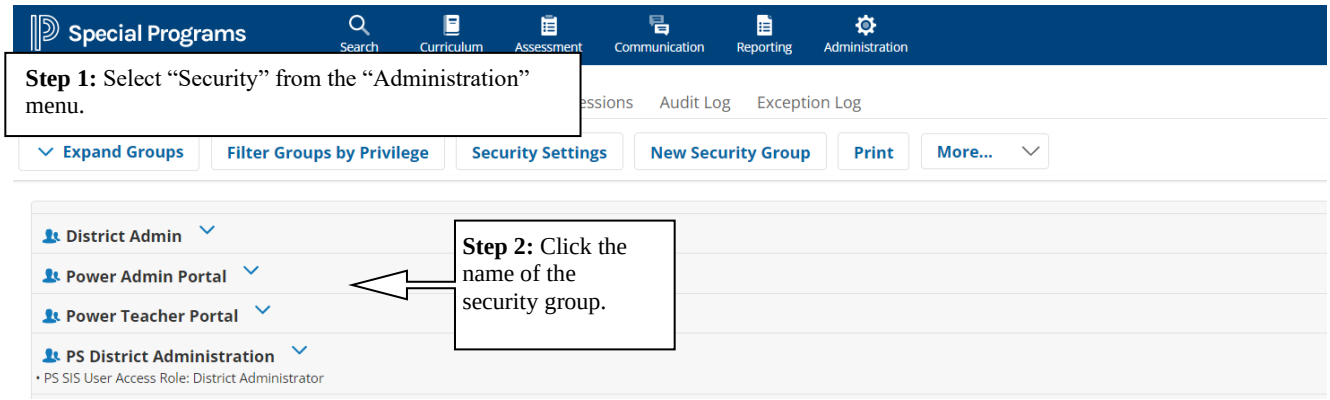
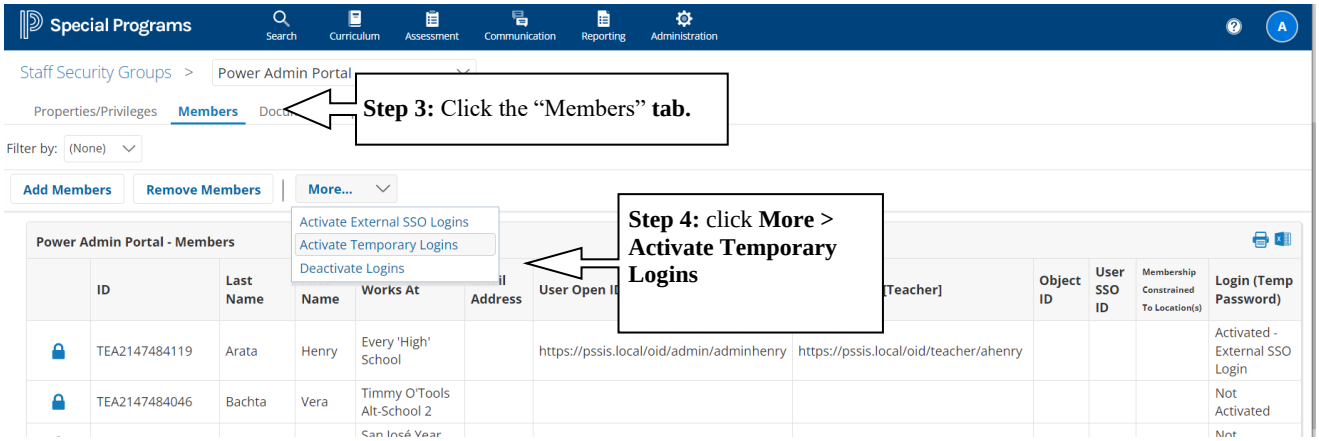
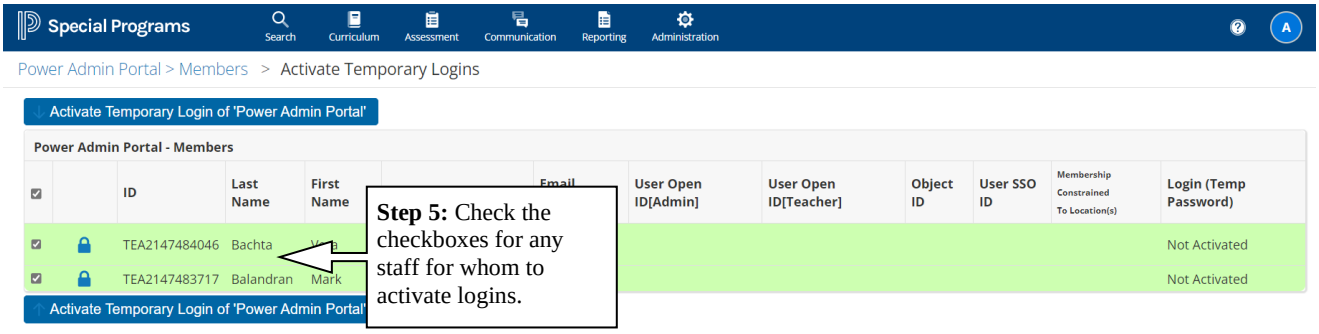
## Via Security Group




It is at this time that the user can login to the front end of PowerSchool Special Programs and set their permanent PowerSchool Special Programs password with the temporary password that was provided.



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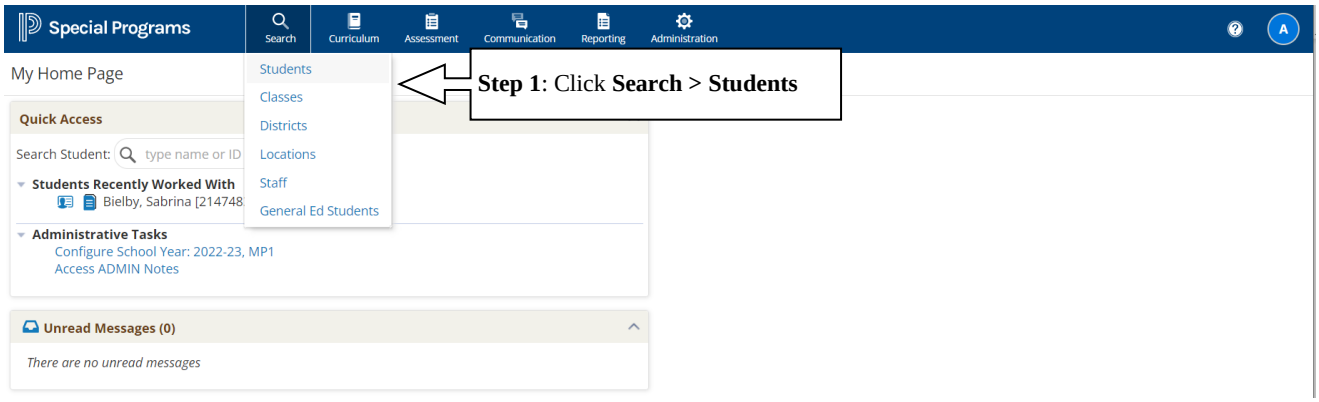
As a note, PowerSchool Special Programs does not recognize that the user is "Active" in PowerSchool Special Programs until the user has set their permanent password. This means that PowerSchool's Single Sign on into PowerSchool Special Programs will not work until this is done.

## Parent/Guardian Dual Login

For parent/guardians to log into PowerSchool Special Programs, each student's security profile must have parent/guardians access enabled. This can be done either on an individual basis, or by student search.

### *Individually Assigning PowerSchool Special Programs Credentials*





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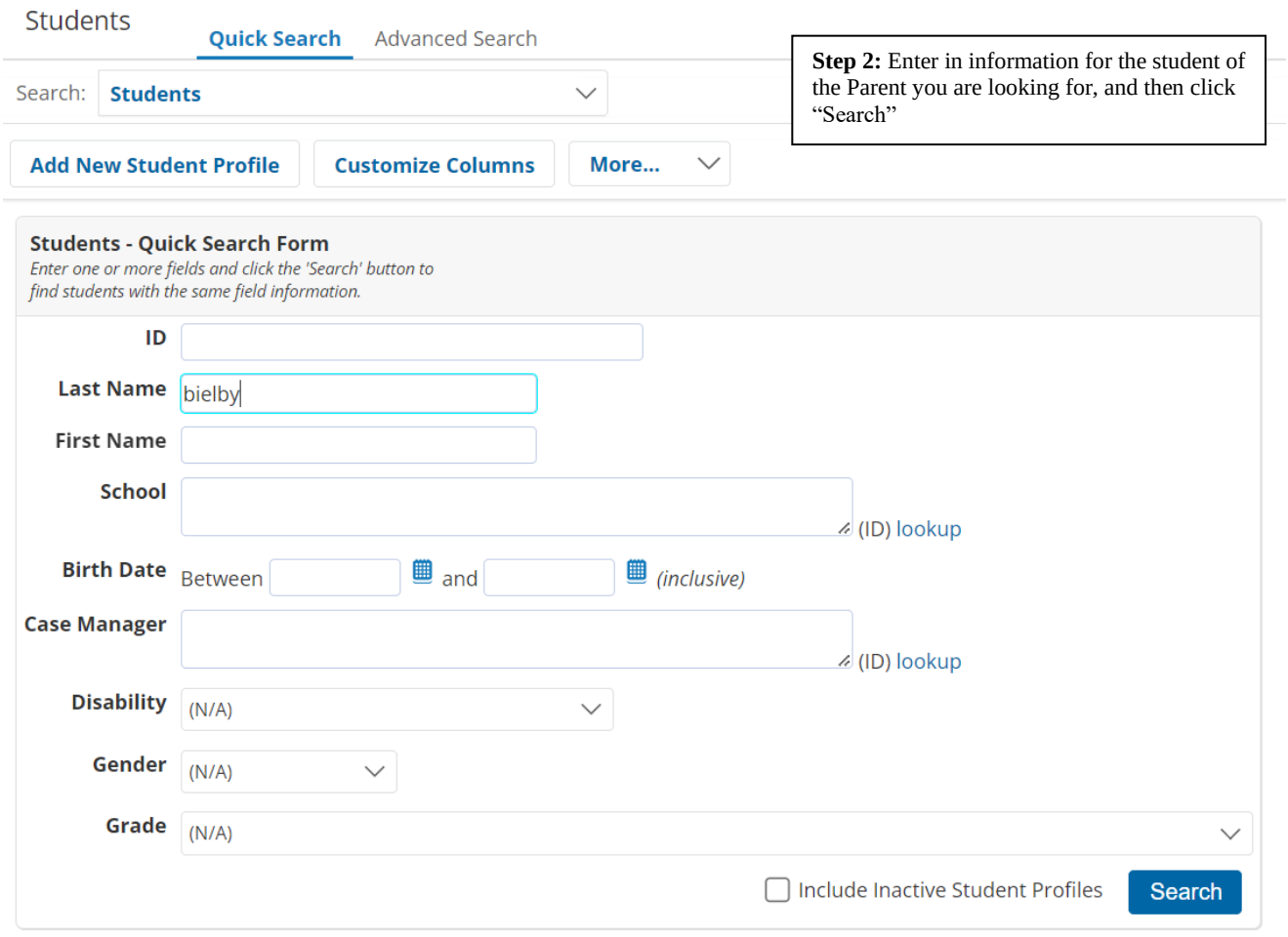
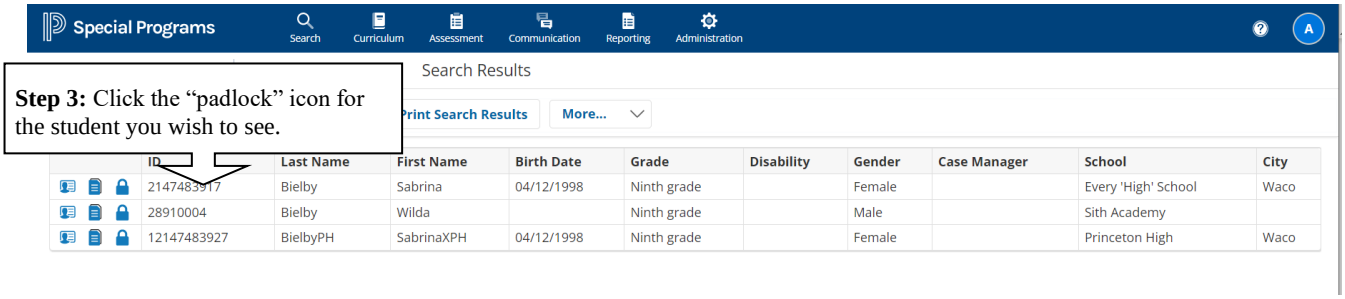



**Step 2:** Enter in information for the student of the Parent you are looking for, and then click "Search"




**Step 3:** Click the "padlock" icon for the student you wish to see.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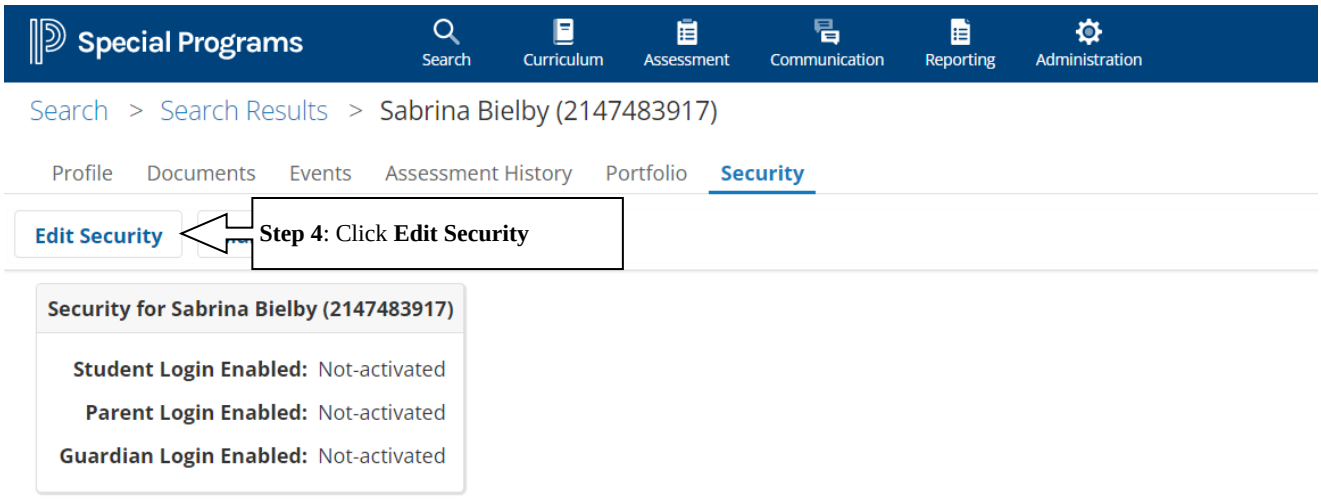


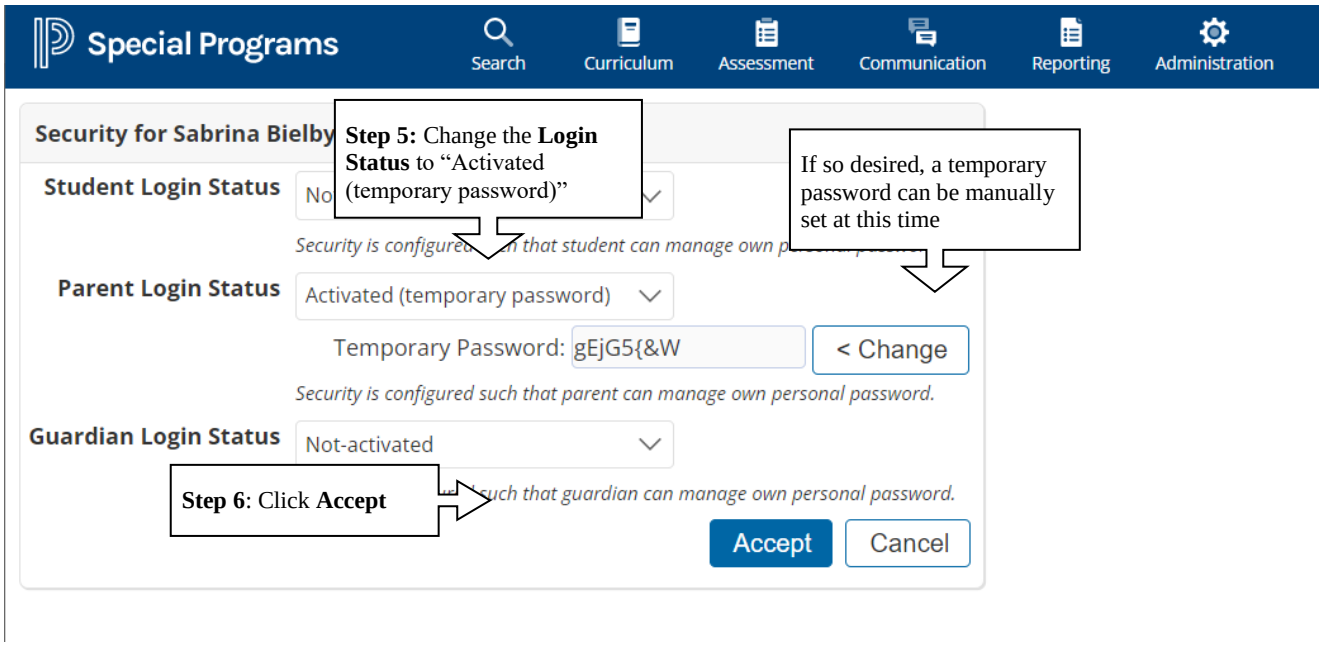


It is at this time that the user can login to the front end of PowerSchool Special Programs and set their permanent PowerSchool Special Programs password with the temporary password that was provided.

Unlike assigning temporary logins for staff, this will not prevent parents and guardians from accessing PowerSchool Special Programs from PowerSchool's Single Sign On.


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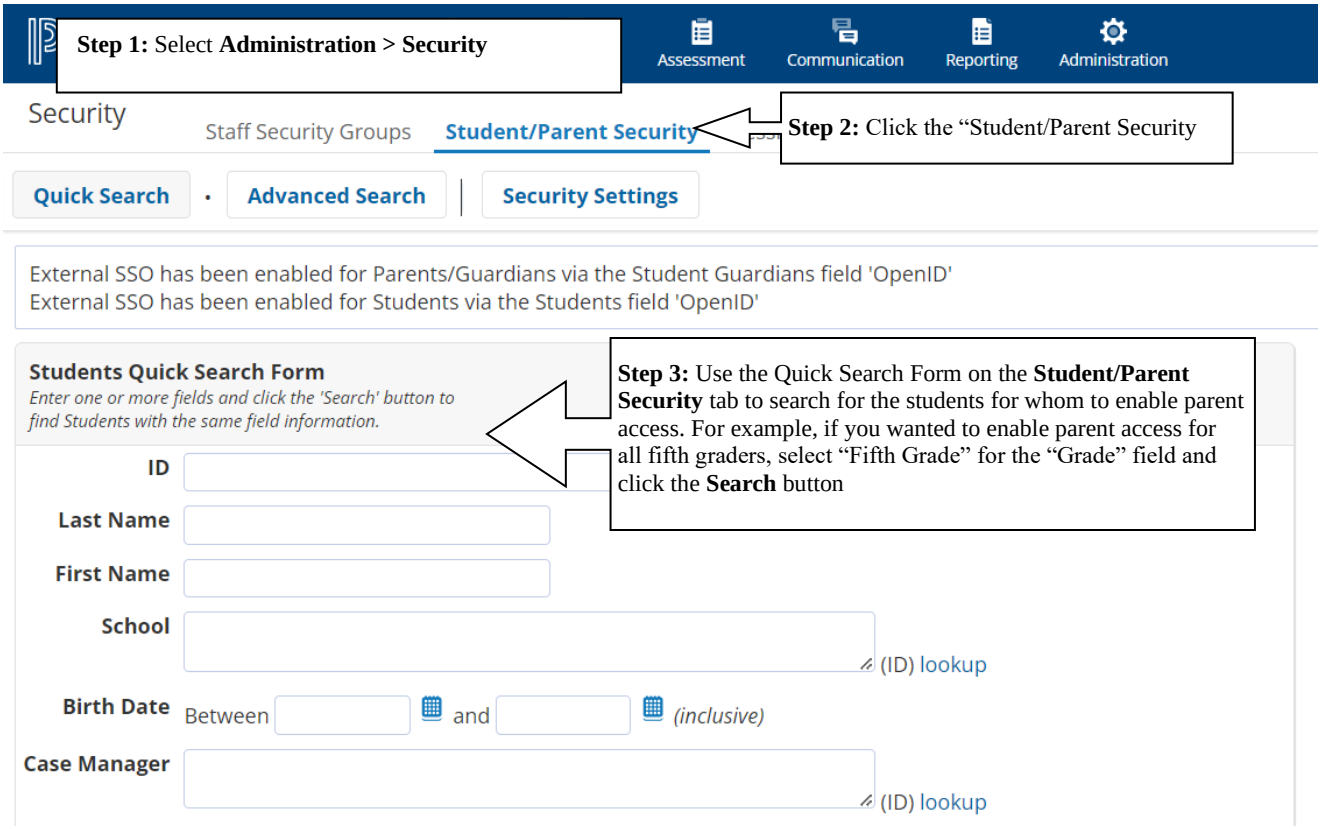
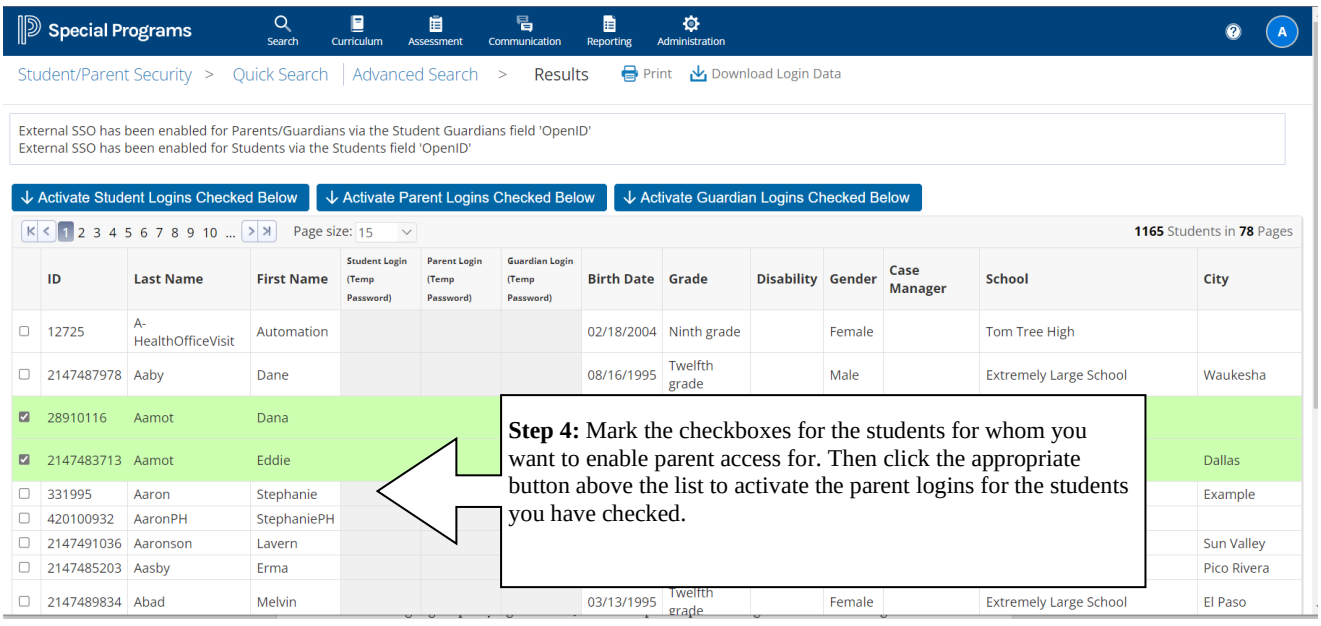
## Via Student Search





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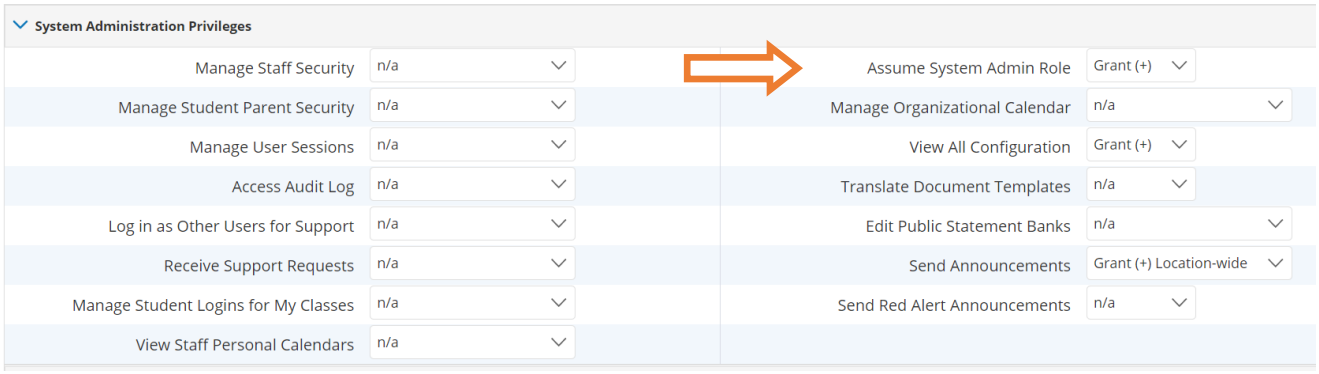
It is at this time that the user can login to the front end of PowerSchool Special Programs and set their permanent PowerSchool Special Programs password with the temporary password that was provided.

Unlike assigning temporary logins for staff, this will not prevent parents and guardians from accessing PowerSchool Special Programs from PowerSchool's Single Sign On.

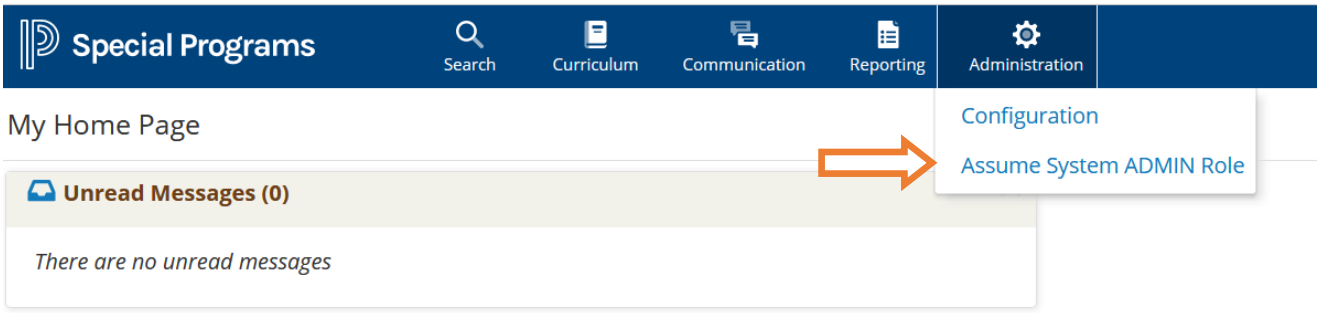
### Assume System ADMIN Role

Some operations in PowerSchool Special Programs require password authentication to complete the action. An example of this is deleting curriculum – it is a dangerous operation so the software requires that the user type in their password to confirm their identity before the operation is completed.

However, when using SSO to access Special Programs, the user's password is stored in an external system, so verification of correctness is not possible. To solve this, staff can be given a privilege to assume the system admin role to perform these operations.




When a user has this privilege, they have access to a menu item that they can assume the system admin role.




Clicking that menu item prompts the user to enter a reason for assuming the role and also requires that they enter the correct password for the system admin user.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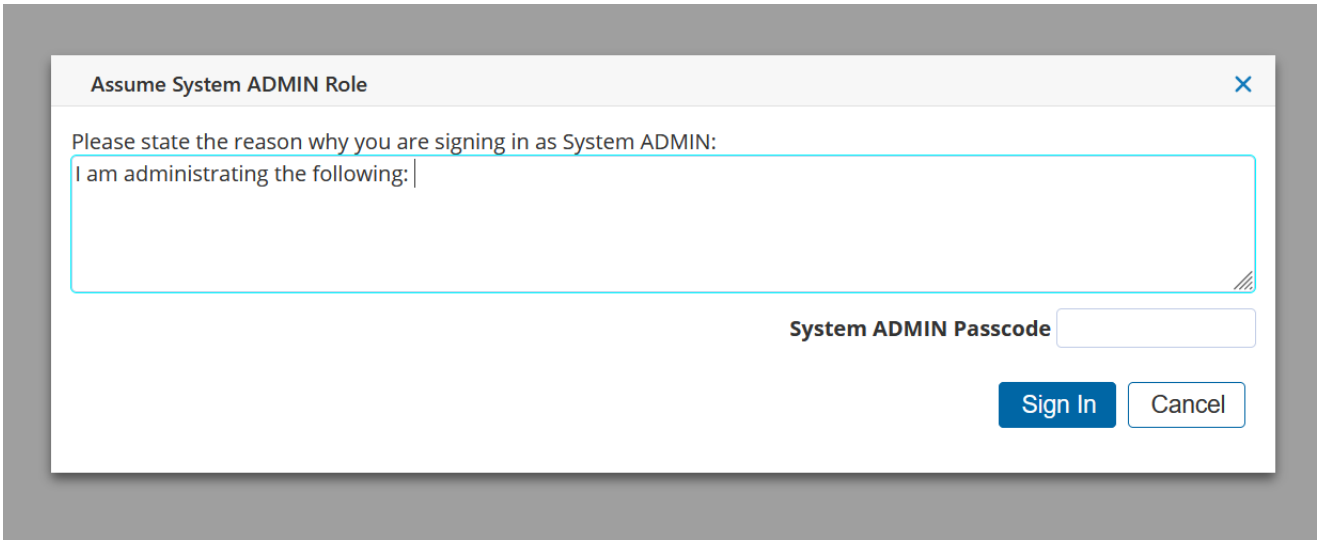
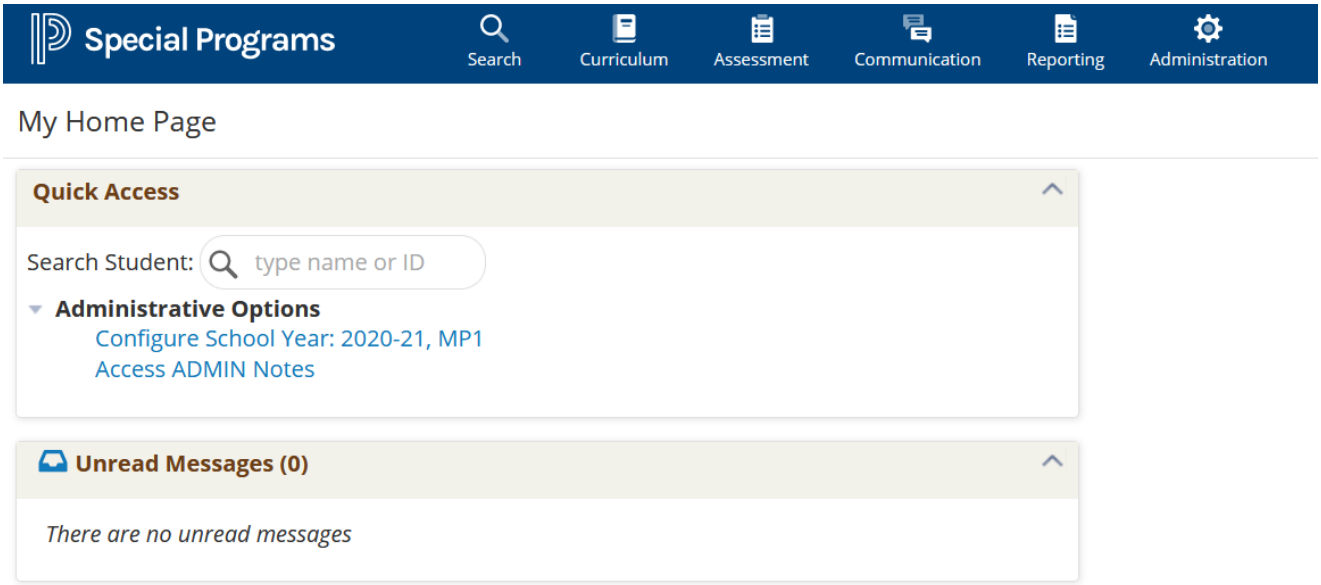



Upon entering the correct password, the user now has system admin privileges to complete any operations that require those privileges. Only users that have the correct password will be able to assume the role – that is how a district would control who can do this.




## Security Roles

When PowerSchool Special Programs staff data is initially populated from PowerSchool SIS, staff are not yet assigned to security groups within PowerSchool Special Programs. Staff can be assigned to security groups manually by the system administrator as described in the "Managing Security" chapter of the "System Administration Guide". PowerSchool Special Programs can alternatively be configured to map staff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membership in certain security groups to membership in associated SIS user access roles. Then, **as staff users sign into PowerSchool Special Programs** (including via SSO), the user's membership in any mapped security groups is updated (granted or revoked) to reflect the corresponding membership in the associated SIS user access roles.

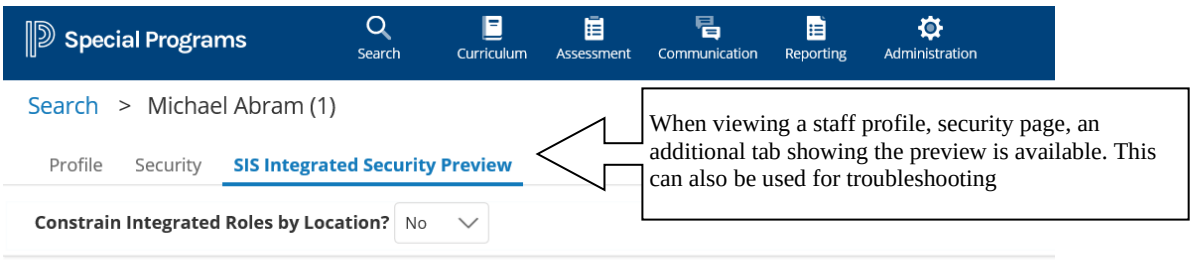
## Security Integration Options

This security integration functionality has several options associated with it:

- Preview mode
- Enabled
- Enabled, Constrain by Location

### Preview Mode

In the security integration preview mode, this allows the admin user to see how a staff security profile would be affected if the security integration is enabled. When this is on, the staff security will remain unaffected but shows an additional security page that informs the user how the integration would operate for any staff user. This gives the opportunity for the admin user to gain a level of confidence in it before committing to turning it on.




| Security Group | SIS User Access Role | Location | Change |
|---|---|---|---|
| **District Admin** | District Administrator | Apple Grove High School | REMOVE |
| **District Admin** | District Administrator | Apple Grove High School 2 | REMOVE |
| **District Admin** | District Administrator | System-wide | ADD |
| **PS District Administration** | District Administrator | Apple Grove High School | REMOVE |
| **PS District Administration** | District Administrator | Apple Grove High School 2 | REMOVE |
| **PS District Administration** | District Administrator | System-wide | ADD |
| **PSSP Role** | PSSP Role | Apple Grove High School | REMOVE |
| **PSSP Role** | PSSP Role | Apple Grove High School 2 | REMOVE |
| **PSSP Role** | PSSP Role | System-wide | ADD |
| **Regular Ed Teachers** | *n/a* | Apple Grove High School | No Change |

*The table above shows the security group membership changes that will be made for this staff profile by integrating security groups with their corresponding SIS user access roles (based on whether integrated roles are being constrained by location.)*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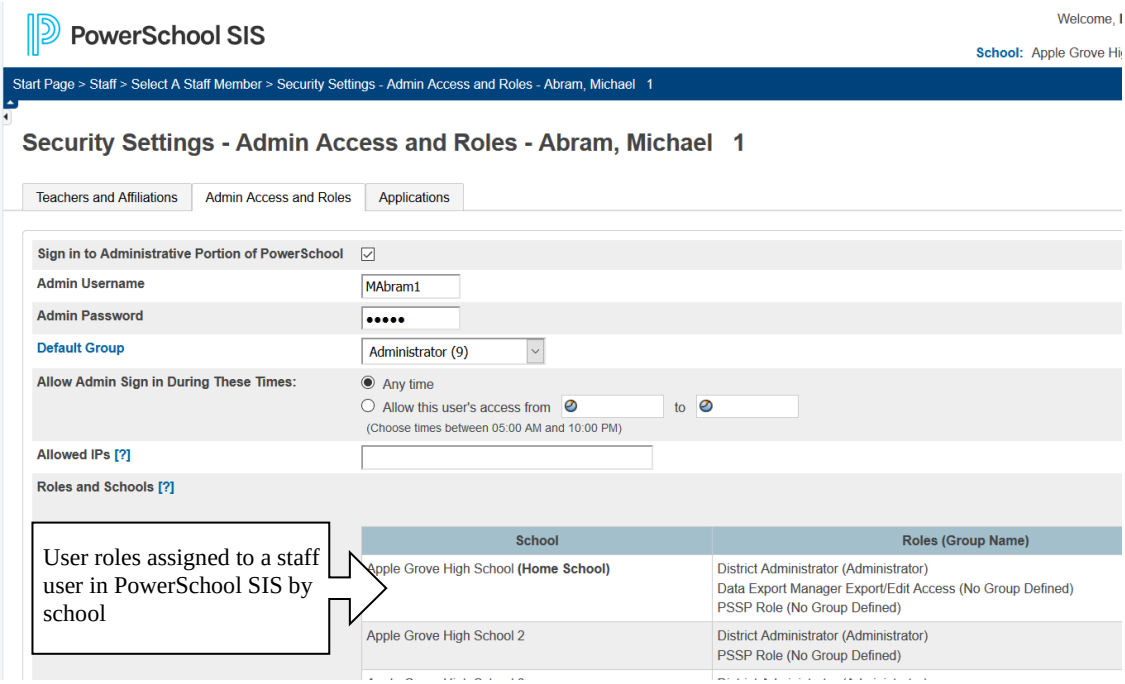
### Enabled

When the security integration is enabled, by default if a user is in a role in PowerSchool SIS that is mapped to a security group in Special Programs, then the staff will be added to the security group with system-wide membership.

### Enabled, Constrain by Location

An additional option is available when the security integration is enabled that will use the school/role mapping in PS SIS to constrain security group membership in Special Programs to the corresponding locations.





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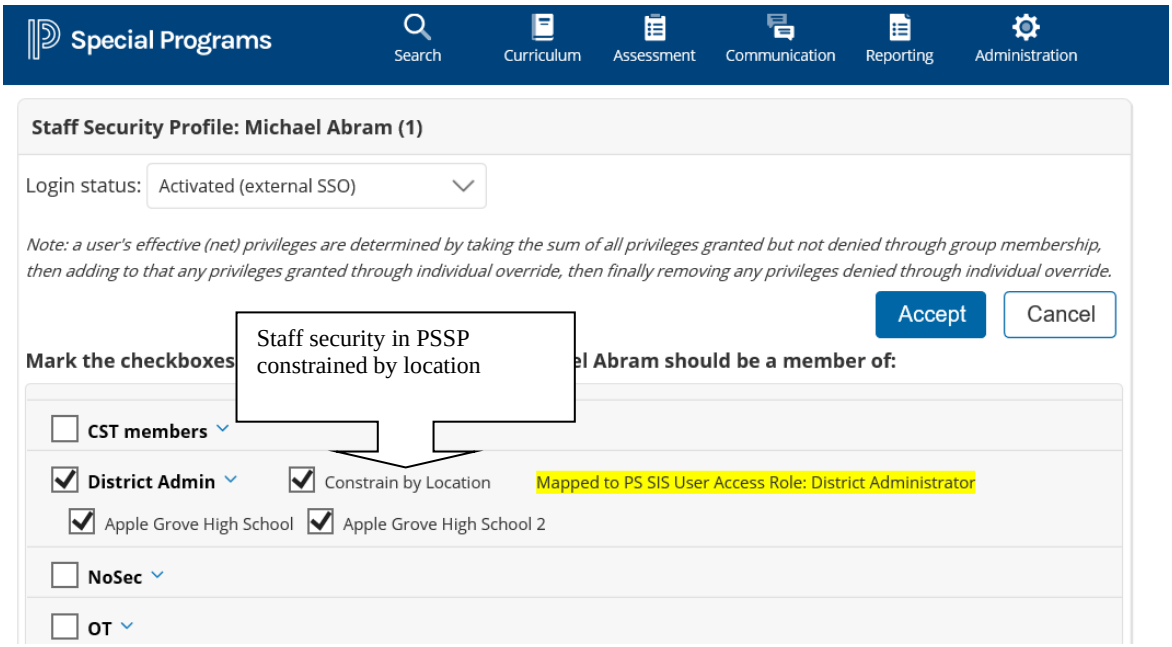



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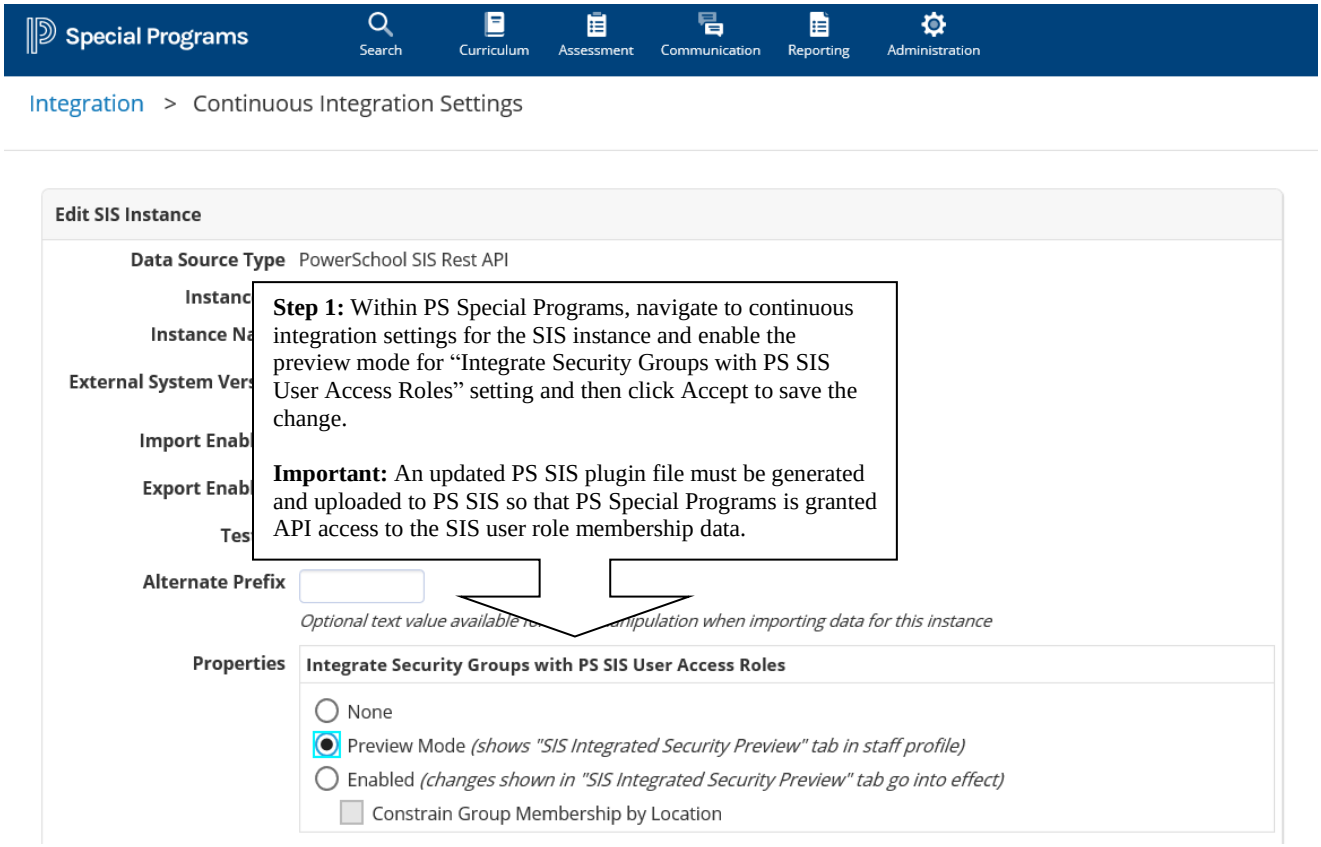
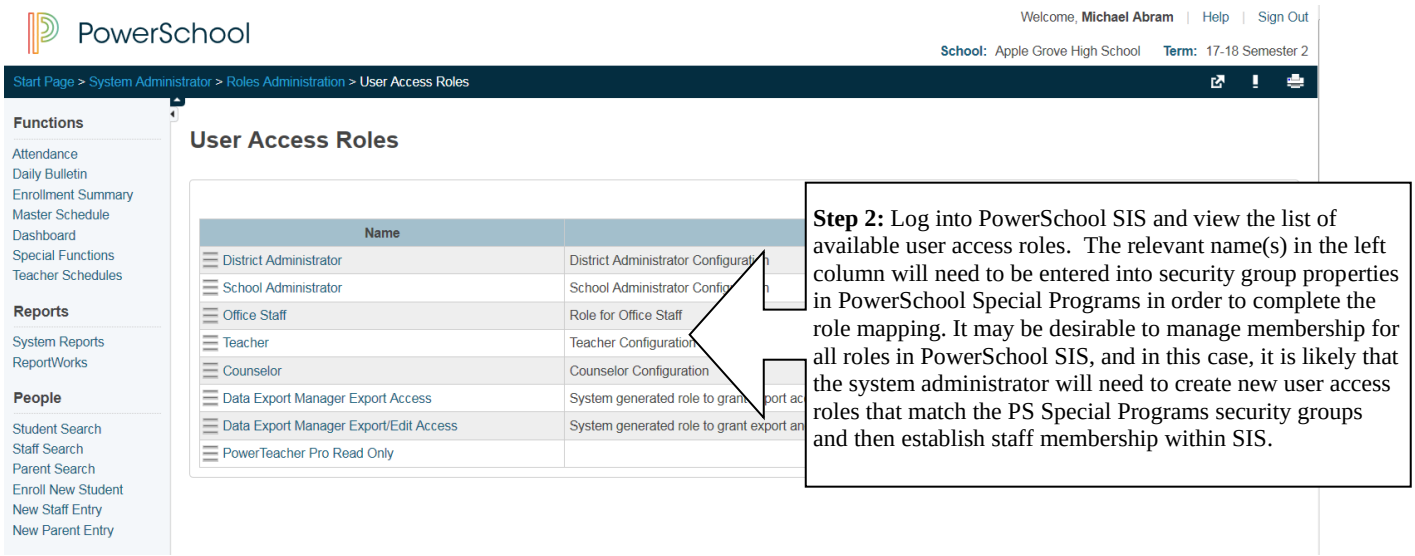
## Enabling Security Integration

Follow the steps below to enable the security integration preview. These same steps can be used when fully enabling the integration.





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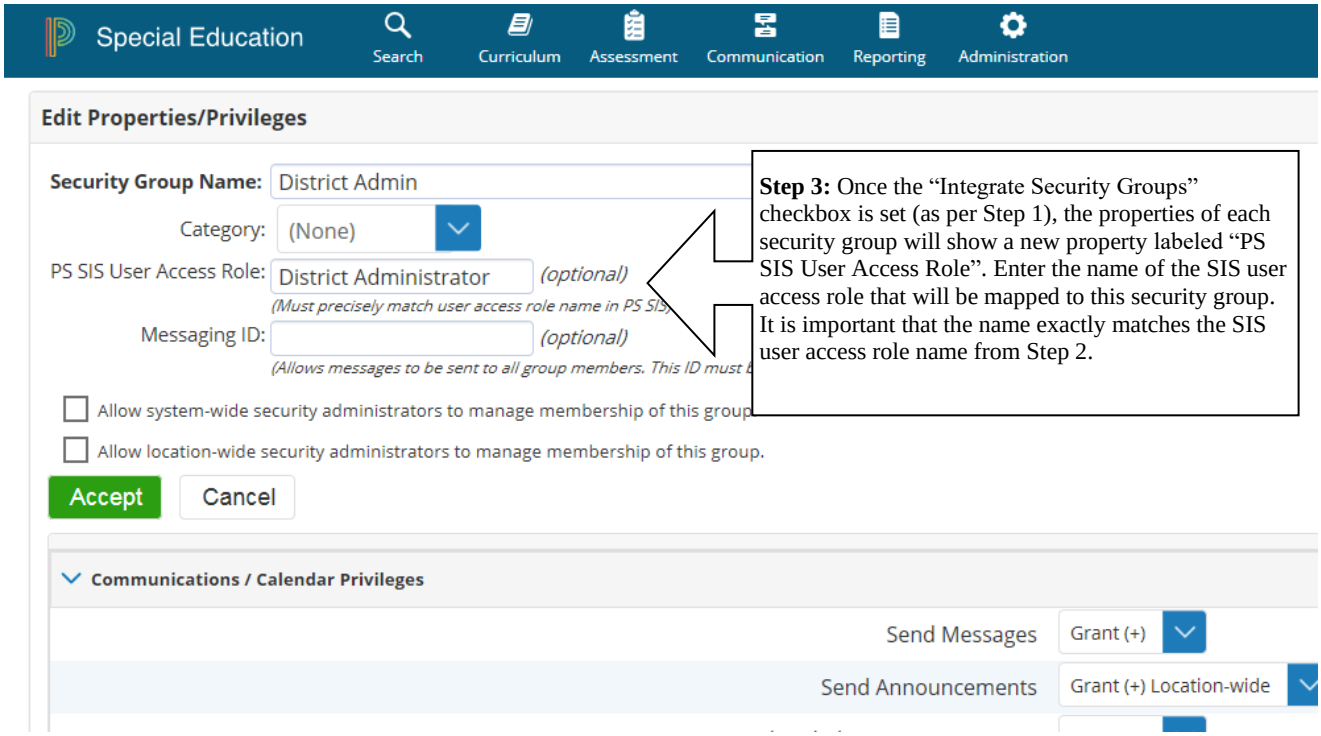
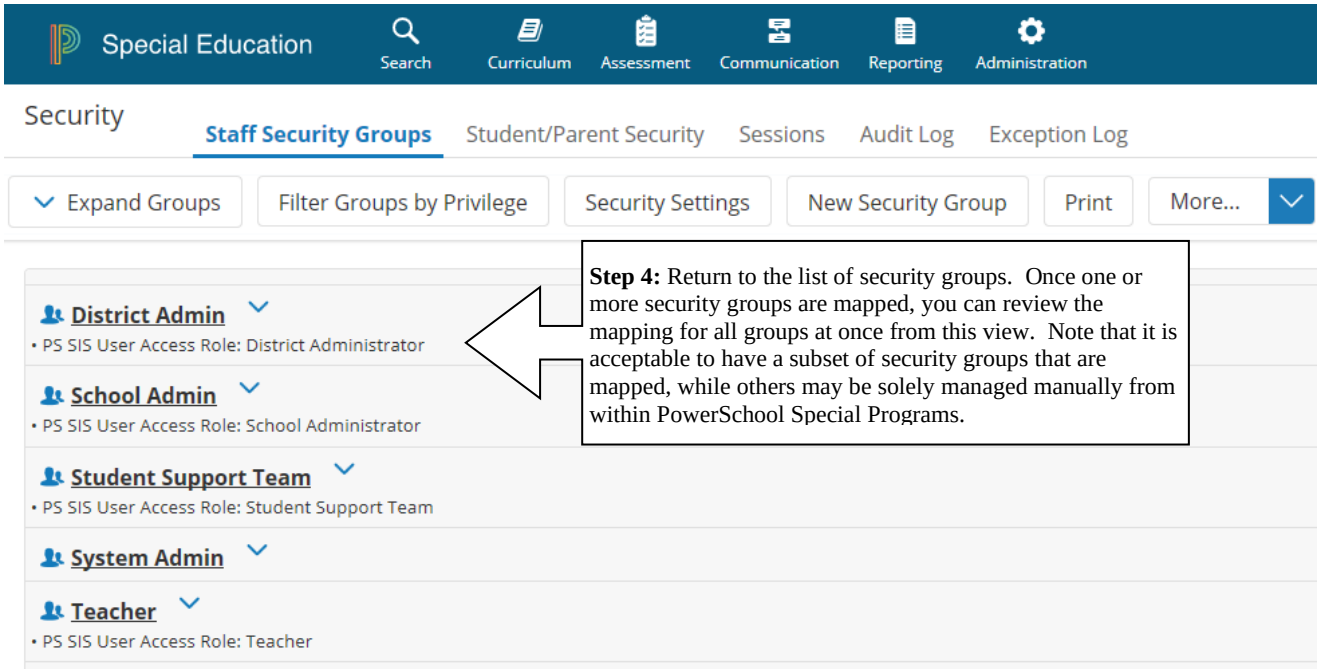



**Step 3:** Once the "Integrate Security Groups" checkbox is set (as per Step 1), the properties of each security group will show a new property labeled "PS SIS User Access Role". Enter the name of the SIS user access role that will be mapped to this security group. It is important that the name exactly matches the SIS user access role name from Step 2.




**Step 4:** Return to the list of security groups. Once one or more security groups are mapped, you can review the mapping for all groups at once from this view. Note that it is acceptable to have a subset of security groups that are mapped, while others may be solely managed manually from within PowerSchool Special Programs.

**Important:** In PowerSchool SIS, membership in user access roles for individual staff are assigned at the location/school level as shown in the first screen shot below. Membership at the location/school level is carried over into PS Special Programs as shown in the second screen shot below.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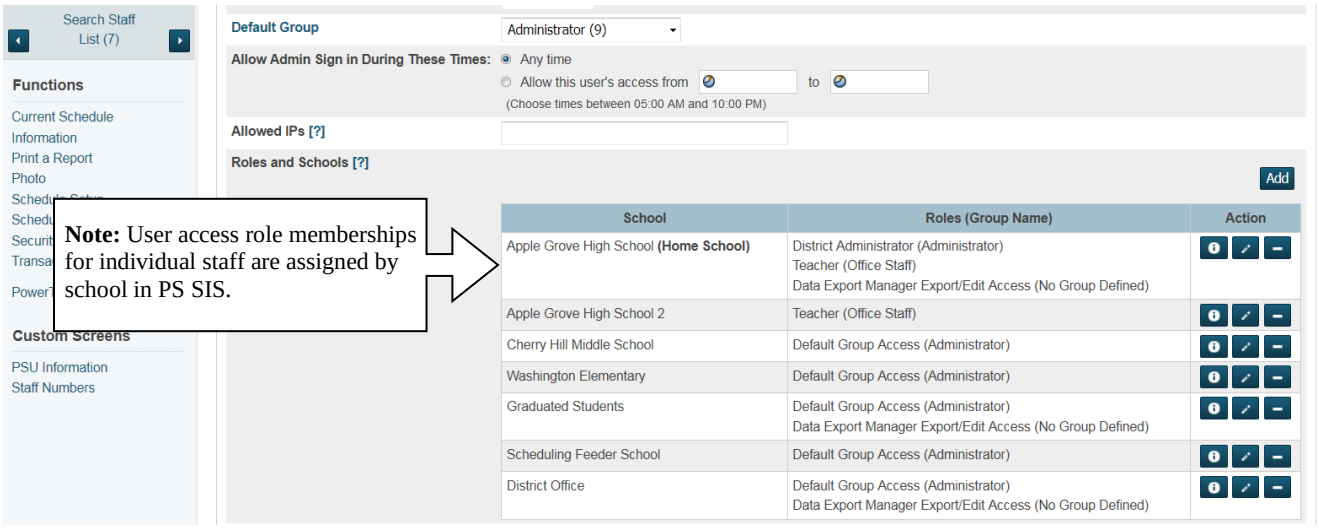


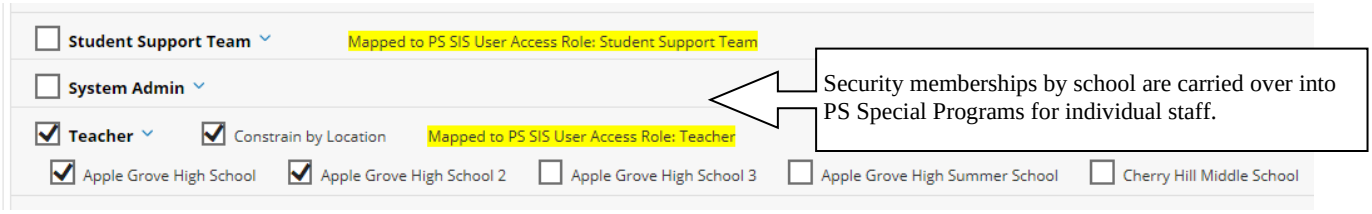


**Reminder**: Staff security group membership is only updated when they log into Special Programs. If they never log in, their security membership will not change.


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# Advanced

Chapter 6

*This section describes advanced setup for the integration.*

## Ignore Processing Certain Locations

It is not uncommon for a district to have schools in their SIS that should not always be processed, and in some cases ideally never processed. For example, summer schools are only active during the summer – it consumes integration time to process these schools during the normal school year. Another example is when a school is closed – it may still exist in the SIS but is wasteful to process the integration for these.

The integration can be optimized to skip certain locations by adding a new field **IgnoreForIntegration** that is a logical value (data or calculated). When this evaluates to true, then the location is ignored by the integration until it evaluates to false.

For a multi-valued field, all values are evaluated and if any result in true then the location will be ignored until they all evaluate to false again.

**Example**
Suppose we would like the integration to only process summer schools in the summer and not process closed schools at all. To accomplish this, we add a logical field to Locations named **Closed**. We also add 2 date fields to Locations: **OpenDate** and **CloseDate**.

The resulting formula can be:

```
Closed OR (OpenDate IS NOT EMPTY AND CloseDate IS NOT EMPTY AND
(CurrentDate() <= OpenDate OR CurrentDate() >= CloseDate))
```

This formula will be true if the location is marked as closed or CloseDate and OpenDate have values and the current date is outside of that range (before it opens or after it closes). Remember that a true value means that it will be ignored during integration.

# Troubleshooting

Chapter 7

*This section describes tips and tactics for troubleshooting the integration.*

### OpenID Logging

Problems with Single Sign-On via OpenID from PowerSchool SIS are difficult to figure out when it is not working. However, the OpenID implementation allows verbose logging to be done so that you can trace an SSO attempt. To enable this, navigate to the PowerSchool Special Programs website to the page userlogin_openid.aspx. Use the initlog URL parameter to turn on logging.

**initlog=Y** – indicates that logging should be turned on

For example:

[Server URL]\userlogin_openid.aspx?initlog=Y

Note that this will be needed to be run on each web server if there is more than one.

To turn off logging, the **initlog=N** parameter should be passed to the page.

For this to work a application setting is required for all of the web servers. This can just be set once and remain set for when it will be needed. The application setting (set in web.tienet.config) is:

```
<add key="OpenIDLogFilePath" value="C:\temp\openid.txt" />
```

Note that the IIS user will need privileges to write to the directory and file.

## Continuous Import Testing Mode

When verifying new functionality, such as export or a custom query, it is helpful to be able to have the service execute the functionality more frequently than the default of off-peak hours. Putting the service into "Continuous Import Testing Mode" will allow it to ignore peak hours, and run a complete import cycle every 2 hours (instead of the default of 24 hours – note that if a complete cycle takes longer than 2 hours then that will be the cycle time).

To do this, for each service instance add the following application setting to the PowerSchool Special ProgramsService.exe.config file and then restart the service:

```
<add key="ContinuousImportTestingMode" value="true" />
```

### Stuck Continuous Import

Sometimes the continuous import may appear to be stuck importing data from the same location for days in a row. The normal behavior is for it to import location data in a round-robin fashion, moving onto another location once it has finished with a location.

However, it is important to know that the IntegrationCycleLast value is only incremented for a location if there were no unexpected errors encountered while importing all of the information related to the location. This means that an import failure at the child profile level can cause the IntegrationCycleLast value to remain unchanged so long as the unexpected error persists.

Reviewing all of the import logs and the event log on the servers will be necessary to track down the repeating error and resolve it. Once all errors are resolved, the continuous import will resume normal processing of locations.


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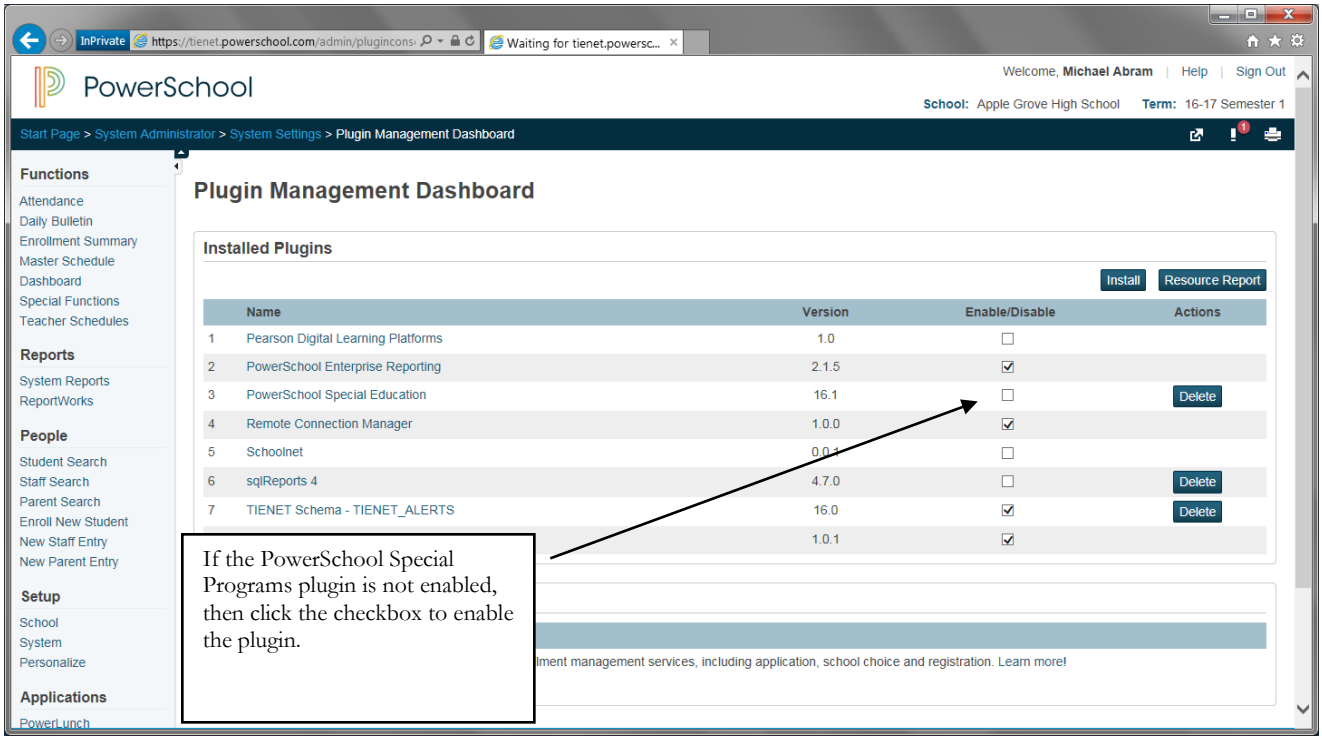
## Special Programs Links Missing

If there are no Special Programs links or embedded pages, it is likely that the PowerSchool Special Programs plugin is not enabled. Navigate to that area under System Settings and confirm that the plugin is enabled and that there are no error messages displaying for the plugin.





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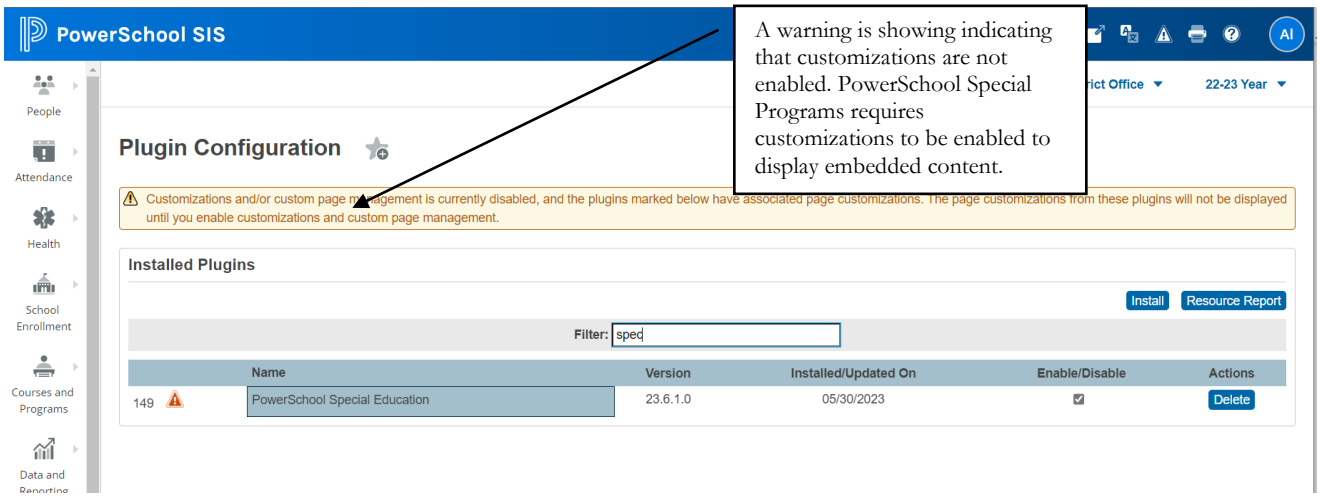
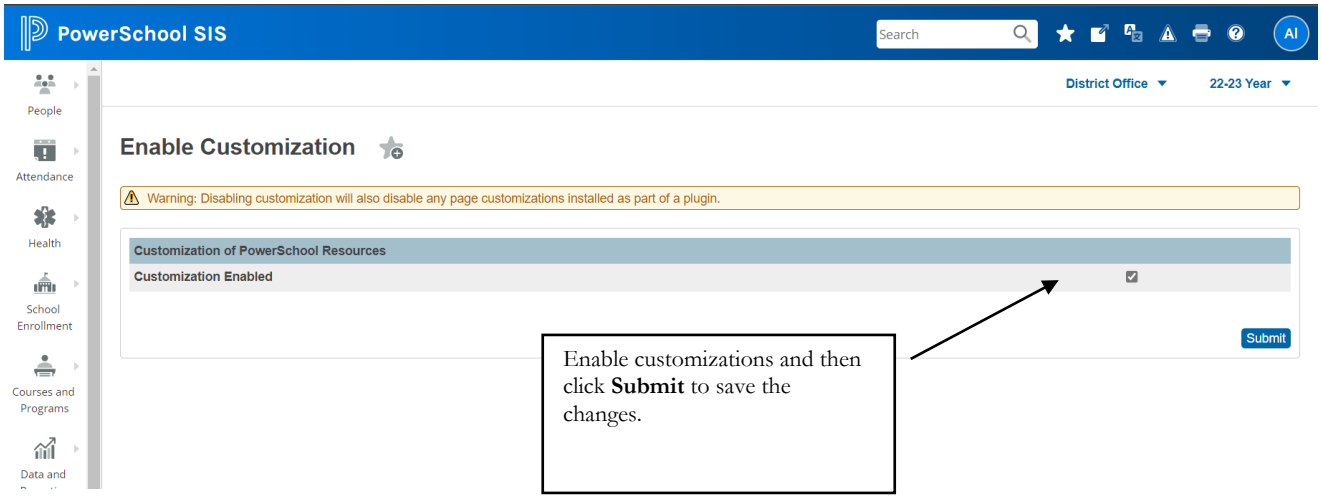
## Special Programs Links Present but Embedded Pages Missing

In this case the Special Programs SSO links are available in PowerSchool, but the embedded pages are not showing. The first thing to do is to navigate to the PowerSchool Special Programs plugin within PowerSchool and verify that it is not reporting any issues.





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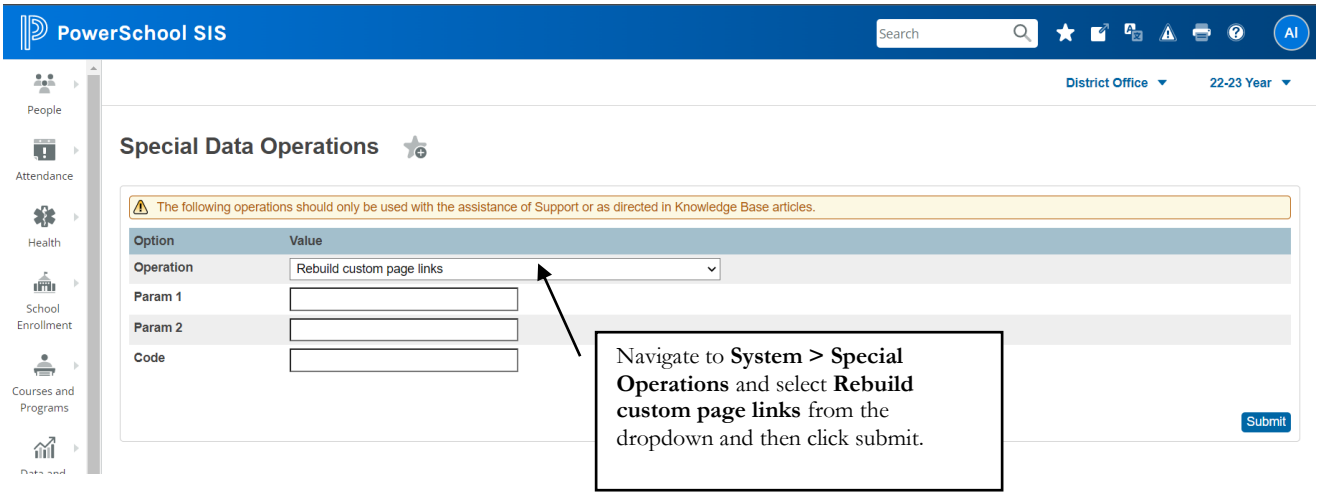
## Embedded Page Not Available in PowerTeacher

When the PowerSchool Special Programs plugin is loaded, most of the content is immediately available. However, in order to get the embedded page to be recognized in PowerTeacher the custom page links must be rebuilt in PowerSchool.




## IFrame Does Not Load in PowerSchool SIS

Potentially the reason for this is that Single Sign-On is failing between the systems. Try unloading the plugin in PowerSchool SIS and reload it again to see if the issue disappears.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# Index

admin portal ..... 20

change notification ..... 35

dual access ..... 28, 29, 32, 48

guardian portal ..... 28, 31

import layouts ..... 33

manual updates ..... 39

Open ID ..... 45, 48, 51

parent portal ..... 28, 31
plugin ..... 4, 13
PowerTeacher ..... 24

security roles ..... 58
single sign on ..... 20, 28, 31, 45, 51
system admin role ..... 57

teacher portal ..... 24