Staff User Guide

PowerSchool
Student Information System

PowerSchool

Released June 2016

Document Owner: Documentation Services

This edition applies to Release 10 of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Table of Contents

Preface

Use this guide to assist you while navigating PowerSchool. This guide is based on the PowerSchool online help, which you can also use to learn the PowerSchool Student Information System (SIS) and to serve as a reference.

The PowerSchool online help is updated as PowerSchool is updated. Not all versions of the PowerSchool online help are available in a printable guide. For the most up-to-date information, click Help on any page in PowerSchool.

Referenced Sections

This guide is based on the PowerSchool online help, and may include references to sections that are not contained within the guide. See the PowerSchool online help for the referenced section.

Security Permissions

Depending on your security permissions, only certain procedures may be available to you.

Navigation

This guide uses the > symbol to move down a menu path. If instructed to "Click **File > New > Window**," begin by clicking **File** on the menu bar. Then, click **New** and **Window**. The option noted after the > symbol will always be on the menu that results from your previous selection.

Notes

It is easy to identify notes because they are prefaced by the text "**Note:**."

Introduction

PowerSchool make is easy to manage your faculty and staff. From the PowerSchool start page, which serves as the central point to begin your activities, you can search for staff, browse for staff, view the staff directory, add a new staff member, or edit an existing staff member.

Staff Search

Just as it is often necessary to search for students to view or edit student information, you will periodically need to search for staff. For frequently used searches, utilize the Stored Searches function. For more information, see *Staff Stored Searches*.

Search Staff Page

To search for staff, simply click the **Staff Search** link in the main menu. The main part of the start page will then display the Staff Search function.

Search Staff

The following information can be used to search for staff:

Field	Description
[Search Staff]	Enter search criteria in the search field. If Smart Search is enabled, as you begin entering your search criteria, PowerSchool automatically provides a drop-down list of suggestions that you may choose from. For more information, see *Smart Search*. Use the pop-up menu to choose the type of staff member. To select from all staff groups, choose **All**. For more information, see *How to Search for All Staff Members*. **Note:** If you do not have field level security access to certain staff fields, you cannot search for staff using those fields. For more information, see *Field Level Security*.
[Search Icon]	Click to initiate the search.
View Field List	Click to view the Field List pop-up, which displays a list of all fields that can be used to perform a staff search. For more information, see *How to Search for Staff by Other Fields*. **Note:** Database extension fields can be selected on the **Field List** pop-up, but any associated one-to-many tables are not searchable at this time. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.

How to Search	Click to learn about searching. When you finish your review, either click **Back** on the Web browser or click the **Staff** link in the main menu.

Browse Staff

The following information can be used to browse for staff:

Field	Description
[Alphabet]	Click a letter of the alphabet to display a list of staff whose last names begin with the selected letter. For example, if you click **B**, the system displays the staff at your school whose last names begin with a "B". For more information, see *How to Search for Staff by Last Name*.
Teachers	Click to display a list of all teachers at your school. For more information, see *How to Search for All Teachers*.
Staff	Click to display a list of all staff members at your school. For more information, see *How to Search for All Staff*.
Lunch Staff	Click to display a list of all lunch staff at your school. For more information, see *How to Search for All Lunch Staff*.
Substitutes	Click to display a list of all substitutes at your school. For more information, see *How to Search for All Substitutes*.
[Gender]	Click **M** to display a list of all the male staff members at your school. Click **F** to display a list of all the female staff members at your school. For more information, see *How to Search for Staff by Gender*.

Other Options

When searching for staff, the following other options are available for selection:

Field	Description
New Staff Entry	Click to add a new staff member to your school. For more information, see *How to Add a New User*.
Staff Directory	Click to view the staff directory. For more information, see *Staff Directory*.
Stored Searches	Click to create or work with a saved list of preset search criteria used to quickly find groups of staff members. For more information, see *Staff Stored Searches*.

How to Search for All Staff Members

This is the easiest search, but it also produces the largest number of results.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **All** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page appears.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for All Teachers

Note: Alternatively, you can click the **Teachers** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Teachers** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all teachers, staff, lunch staff, and substitutes at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for All Staff

Note: Alternatively, you can click the **Staff** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Staff** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all staff members at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for All Lunch Staff

Note: Alternatively, you can click the **Lunch Staff** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Lunch Staff** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all lunch staff members at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for All Substitutes

Note: Alternatively, you can click the **Substitutes** link.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Choose **Substitutes** from the pop-up menu.
3. Click the **Search** icon. The Select a Staff Member page displays the names of all substitutes at your school.
4. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for Staff by Last Name

Note: Alternatively, you can click a letter of the alphabet to view all staff members whose last name begins with that letter.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. In the **Search Staff** field, enter the last name of a staff member whose record you want to review.

   Note: Alternatively, enter just the first few letters of the staff member's last name; however, this produces more records.

3. Use the pop-up menu to choose the type of staff member. To select from all staff groups, choose **All**.
4. Click the **Search** icon. If you search for a staff member who has a unique last name, the search displays the one record it finds. If you search for a staff member who has a common last name, a list of staff members appears.
5. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for Staff by Gender

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Enter either **gender=m** or **gender=f** in the **Search Staff** field.
3. Use the pop-up menu to choose the type of staff member. To select from all staff groups, choose **All**.
4. Click the **Search** icon. The Select a Staff Member page displays the male or female staff members.
5. Click the name of the individual whose record you want to review. To work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Search for Staff by Other Fields

Like many other applications, PowerSchool stores data in fields. A field is a unit of information defined by your PowerSchool administrator. PowerSchool comes with a set of standard fields used by all schools, but your school can add other fields that are particular to your needs. Additionally, fields are added to the field list with new versions of PowerSchool. Click to display a list of all teacher-related fields stored in your school's PowerSchool database.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

5. Click the **Search** icon. The Select a Staff Member page displays the staff members that meet the criteria you entered.

   Note: If you search for a staff member who has a value for a field matching no other staff's value, the search displays the one record it finds.

6. Click the name of the individual whose record you want to review, or, to work with the entire group of staff members, click **Functions** at the bottom of the list to display the Group Staff Functions page. For more information about the group staff functions, see *Work With Staff Groups*.

How to Select a Group of Teachers by Hand

This selection process is helpful to select a group of teachers from a larger group allowing you to narrow your search results even further.

1. On the start page, search for and select a group of staff members.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Select Teachers By Hand** to narrow the group of teachers even further. The Select Teachers By Hand page appears.
4. Press and hold COMMAND (Mac) or CONTROL (Windows) and click the names of the teachers to include in the group.

   Note: If the teachers are listed consecutively, click the first name on the list. Press SHIFT as you click the last name on the list. This selects the first and last names you click and every name in between.

Alternatively, if you are selecting the majority of the teachers on the list, select the teachers you do not want to keep and select the **Remove selected teachers** option. If you are selecting only a few of the teachers on the list, select the **Keep selected teachers** option.

5. Click **Functions**. The Group Staff Functions page appears. For more information about the group staff functions, see *Work With Staff Groups*.

Staff Stored Searches

Use stored searches to repeatedly search for groups of staff members. Set up and save the search or use a search that someone else has set up.

How to Create a Stored Staff Search

Create a new group of staff members for whom you and other users can search. To create a stored search that is similar to another stored search, copy a command string from another search and paste it into a new search group. You must then make the necessary changes or additions to the command string for the new group.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.
5. Enter a field operator and value after the field in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click **Stored Searches**. The Stored Staff Searches page appears.
7. Click **New**. The Edit Stored Staff Search page appears.
8. Use the following table to enter information in the fields:

Field	Description
Name	Enter a name for the stored search.

Search instructions	Enter the field and field values determined in Step 2. **Note:** Use one command on each line. Field names must be entered exactly as they appear in the Staff Field List.

9. Click **Submit**. The Stored Staff Searches page displays the new stored search.

How to Search for Staff Using Stored Searches

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Stored Searches**. The Stored Staff Searches page appears.
3. Click the **Search** icon next to the name of the stored search. The Group Staff Functions page appears and asks what to do with your selection. For more information, see *Work With Staff Groups*.

How to Edit Stored Staff Search Criteria

If you find that a search is not finding the correct staff members, there could be a problem with the search commands. On the other hand, perhaps the criteria for a specific group have changed. In either case, you must edit the search criteria.

Note: All PowerSchool users on your system will be impacted by your change. Contact other users before editing the criteria of a stored search.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **View Field List**. The Field List pop-up appears.
3. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank.
4. Click the field you want to add. The Field List pop-up closes and the selected field appears in the **Search Staff** field.
5. Enter a field operator and value after the field in the **Search Staff** field.

   Note: For more information about comparators, see *How to Use Comparators*.

6. Click **Stored Searches**. The Stored Staff Searches page appears.
7. Click the name of the stored search you want to edit. The Edit Stored Staff Search page appears.
8. Edit the information as needed. For field descriptions, see *How to Create a Stored Staff Search*.

9. Click **Submit**. The Stored Staff Searches page displays the edited stored search.

How to Delete a Stored Staff Search

Remove a stored staff search that is no longer used.

Note: All PowerSchool users on your system will be impacted by your change. Contact other users before editing the criteria of a stored search.

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Stored Searches**. The Stored Staff Searches page appears.
3. Click the name of the stored search you want to delete. The Edit Stored Staff Search page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

Staff Directory

The staff directory displays the staff for the selected school and term. Use the staff directory to filter groups of staff members according to their functions or to find staff members' email addresses.

How to View the Staff Directory

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Staff Directory**. The Staff Directory page appears.
3. Click the individual's email address to send an email message to that staff member. Alternatively, select the email addresses in the Group Email field. Using your email application, copy and paste the selected addresses into the address field of a new email message.

How to Filter Staff Groups

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **Staff Directory**. The Staff Directory page appears.
3. Click a staff group next to Listing Options. The selected staff group appears.

4. Click the individual's email address to send an email message to that staff member. Alternatively, select the email addresses in the Group Email field. Using your email application, copy and paste the selected addresses into the address field of a new email message.

Staff Security Settings

PowerSchool administrators use this page to modify security settings for selected staff members. For more information, see *Security Permissions*.

New Staff Members

In PowerSchool, system users are considered staff members. All PowerSchool system users must be added as staff members before you can assign security permissions. When adding new staff members, you can assign permissions, as needed. Additionally, you can assign permissions by user group or set permissions at the page level. For more information about assigning permissions by user group, see *Group Security Permissions*.

How to Add a New Staff Member

1. On the start page, choose **Staff Search** under People in the main menu. The Search Staff page appears.
2. Click **New Staff Entry**. The New Staff Member page appears.
3. Use the following table to enter information in the fields:

Field	**Description**
Name	Enter the user's last, first, and middle name.
Preferred Name	Enter the staff member's preferred name, such as a nickname.
Email Address	Enter the user's email address.
Title	Enter the user's user role or professional title.
Gender	Choose **Male** or **Female** from the pop-up menu.
Ethnicity	Choose the user's ethnicity from the pop-up menu.
ID	Enter the user's identification number. This is a required field.

Homeroom	Enter the user's homeroom number.
School	The selected school appears.
Lunch ID	The user's PowerLunch identification number appears.
Home Phone #	The user's home telephone number appears.
School Phone #	The user's school telephone number appears.
Street	The user's address appears.
City, State, Zip	The user's city, state abbreviation, and postal code appear.
SSN	The user's Social Security number appears.
DOB	The user's birth date appears.
Staff Type	Choose the user's status from the pop-up menu. It is recommended that a status is assigned to each staff member. This makes searching for and selecting staff members more efficient.

4. Click **Submit**. PowerSchool searches across all schools in the district for duplicate staff records based on matches found in the following fields:
    - Last Name
    - Teacher Number
    - Email Address
    - Lunch ID
    - Home Phone #
    - Lunch ID
    - SSN
    - Address (Street + City + State, or just Street + City if not State is entered)
5. If there are no duplicate records matching that of the new staff record you are trying to create, the new record is created. Assign permissions to the new user. For more information, see *How to Edit Security Permissions*.

6. If there are similar records to the one you are attempting to create, the Match Existing Teachers page allows you to check for duplicate records from a list:
   - If the teacher's name appears on the page, click the name to add the teacher record to the current school.

     Note: If the teacher is found at the current school but marked inactive, the record will be made active.

   - If the teacher's name is not found on the page, click **Create New**. Assign permissions to the new user. For more information, see *How to Edit Security Permissions*.

Teachers and Affiliations

Edit the permissions of staff members on the Teachers and Affiliations tab.

Note: Field level security may be used to restrict this information. For more information, see *Field Level Security*.

How to Edit a Staff Member Security Settings

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. Use the following table to enter information in the fields:

Field	Description
Sign in to PowerTeacher	Select the checkbox if you want this staff member to be able to sign in to PowerTeacher Portal and PowerTeacher Gradebook.
Teacher Username	If you want this staff member to be able to access PowerTeacher, enter a username. If you do not, leave this field blank. **Note:** Use the **LDAP Enabled** checkbox next to the **Teacher Username** field to enable or disable LDAP Authentication for an individual staff member. For more information, see *LDAP*. **Note:** The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Teacher Username**

	(USERS.TEACHERLOGINID) and **LDAP Enabled** (USERS.TEACHERLDAPENABLED). For more information, see *Field Level Security*.
Teacher Password	If you entered a username in the **Teacher Username** field, enter the staff member's PowerTeacher password.
School Affiliations	Manage the schools you want this user to be affiliated with as a teacher/staff member. Selecting more than one school activates the **School** link on the navigation toolbar in the PowerTeacher Portal, and in PowerTeacher Gradebook (if applicable). For more information, see *School Affiliations*.

5. Click **Submit**. The Changes Recorded page appears.

School Affiliations

You can add different school affiliations to the teacher/staff user account. For every school added to this list, a record will be created at that school for the user. The user will be a staff member at that school and will display in search results and can be assigned sections. In PowerTeacher, users can switch to any active school in this list.

Any staff accessing the administrative portion of PowerSchool must also have at least one school affiliation record. If the staff member is not affiliated with any school, then select **District Office** on the **Add Schools** pop-up.

Identify which school is the "home" school for the account. The designated home school is the default context the staff member sees when signed in to PowerSchool.

How to Add School Affiliations

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the Teachers and School Staff section, click **Add** on the School Affiliations row. The Add Schools pop-up appears.
5. Select the checkbox next to each school you want to add.

Note: You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection.

6. Select the **Staff Type** from the pop-up menu.
7. It is recommended that you assign a status to each staff member. This makes searching for and selecting staff members more efficient and can affect what directory the user is in for LDAP systems. To specify the staff member's status, choose one of the following from the pop-up menu:
    - **Not Assigned**
    - **Teacher**
    - **Staff**
    - **Lunch Staff**
    - **Substitute**
8. Click **OK**. The selected School and Staff Type appear on the Security Settings page. The Active checkbox is automatically selected.
9. Click **Submit**. The school associations appear on the Security Settings page.

How to Modify School Affiliations

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the School Affiliations section, deselect the **Active** checkbox next to the school for which you want to remove access.

   Note: Once you click **Submit**, the school still appears on the Security Settings page, but the access is no longer active.

5. Click on the **Staff Status** field for a specific school to change the status, if needed. Select the status from the pop-up menu.

   Note: The user’s **Staff Status** at their home school is reported to LDAP servers regardless of their status at other schools.

6. Click the **Notes** icon in the Action column. The Notes pop-up appears. Enter any pertinent information about this school association for this staff account.
7. Click **Submit** to save changes.

How to Change the Home School

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Teachers and Affiliations** tab.
4. On the School Affiliations section, select **Home School** next to the school you want to designate as the home school for the staff account.
5. Click **Submit** to save changes.

   Note: PowerTeacher always signs a user in to their Home school before any other school. As a result, deselecting **Active** for a Home school will effectively disable access to all of the schools for that user account, since they will not be able to access the system to switch to any other school.

Admin Access and Roles

Assign access to the Administrative portion of PowerSchool and manage roles on the Admin Access and Roles tab.

How to Assign Admin Access

Use this procedure to assign access the administrative portion of PowerSchool.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Click **Security Settings**. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Use the following table to enter information in the fields:

Field	Description
Sign in to Administrative Portion of PowerSchool	If you want this staff member to be able to sign in to PowerSchool, select the checkbox. Otherwise, leave the checkbox deselected.

Admin Username	If you want this staff member to be able to access the entire PowerSchool system, enter a username. If you do not, leave this field blank. **Note:** Usually, only school administrators, PowerSchool administrators, cafeteria personnel, guidance staff, and administrative staff members have access to PowerSchool. Teachers generally only have access to PowerTeacher Portal. **Note:** If LDAP is configured on your server, select the **LDAP Enabled** checkbox to enable or disable LDAP Authentication for an individual staff member. For more information, see *LDAP*. **Note:** Field level security may be used to restrict this information. The **LDAP Lookup** and **Clear** buttons only appear if you have unrestricted Full Access to **Admin Username** (USERS.LOGINID) and **LDAP Enabled** (USERS.ADMINLDAPENABLED). For more information, see *Field Level Security*.
Admin Password	If you entered a username in the **Admin Username** field, enter the staff member's PowerSchool password.
Default Group	To assign the staff member to a security group, choose the appropriate group from the pop-up menu. This security group will be used throughout the administrative portion of PowerSchool unless overridden for a specific school by assigning a specific role. For more information, see *Role Assignments*. **Note:** Click the field name to view each group and its permissions in PowerSchool. For more information, see *How to Edit Security Groups*.
Allow Admin Sign in During These Times	Do one of the following: • Select **Any time** for no restrictions on when the staff member can sign in to PowerSchool. • Select **Allow this user's access from** and use the pop-up menus to choose the time range that the user is allowed to sign in to PowerSchool.

Allowed IPs	If you want this staff member to be able to use PowerSchool from certain computers only, enter the IP addresses of those computers in this field. This setting only affects the administrative portion of PowerSchool. **Note:** If you define more than one IP address, separate each address with a comma. If you want this staff member to be able to access PowerSchool from any computer, leave this field blank.
Roles and Schools	Manage role assignments for the user. For more information, see *Role Assignments*.

Role Assignments

Assigning a role provides you with the flexibility to set different security group access at different schools, or to create a user account for only external systems, such as features added through the Plugin Management Dashboard. Assigning a role is not required if you do not want the user account to have different group security at different schools.

You can assign a different level of the administrative portion of PowerSchool user access for each school affiliation by assigning different roles. Roles are assigned on the Security Settings page. For more information on setting up roles, see *Roles Administration*.

Important Note: At least one role must be associated with a Security Group in order to allow a user to switch to that school. When multiple Roles/Security Groups are added to a school, the users effective security permissions will be the highest level granted for all groups tied to a school. For example, if Group 1 allows access to Historical Grades, and Group 2 allows access to Demographics, then the user will have access to Historical Grades and Demographics. Furthermore, if Group 1 allows View Only access to Historical Grades, and Group 2 allows Modify Access to Historical Grades, then the user will receive Modify Access to Historical Grades. In addition, if a security group is removed from a role that has been assigned to a user, the user's Default Group will become their effective security group (if it was their only role for a particular school). This allows the user uninterrupted access to the school until a role can be added that does have a specific security group.

How to View Assigned Roles

Use this procedure to view roles assigned to a user account.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab. The following information appears:

Field	Description
Add	Click to assign a role. For more information, see *How to Assign a Role*.
School	School(s) the staff member can switch to in the administrative portion of PowerSchool. **Note:** The user's home school appears with **(Home School)** next to it.
Roles ([Group Name])	Roles and the security group associated to the role that have been assigned to the staff member.
[Information Icon]	1. Click to view information about group security permissions. The Effective Security Attributes pop-up displays Effective Security Group Option and Value information. For field descriptions, see *How to Edit Security Groups*. 2. Scroll to the Overridden Page Permissions section and click the arrow to expand the section. Page and Access Level information appear. For field descriptions, see *How to Set Page-Level Permissions*. 3. Scroll to the Field Level Security section and click the arrow to expand the section. Fields and Access Level information appear. For field descriptions, see *How to Modify Field Level Security*. **Note:** This section does not appear if field level security has not been applied. 4. Scroll to the Data Export Manager section and click the arrow to expand the section. Data Export Manager information appears, including the default level followed

	by the data sources users assigned to this role can edit and/or export. 5. When done viewing, click **OK** to close the pop-up.
[Edit Icon]	Click to edit a role assignment. For more information, see *How to Edit a Role Assignment*.
[Delete Icon]	Click to delete a role assignment. For more information, see *How to Delete a Role Assignment*.

How to Assign a Role

Use this procedure to assign a role to a user account that will access the administrative portion of PowerSchool.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Under Roles and Schools, click **Add**. The Add User Access Roles pop-up appears.
5. Use the following table to enter information in the fields:

Field	Description
Step 1: Schools	1. Select the checkbox next to each school you want to add to the list of schools this staff member can switch to in the administrative portion of PowerSchool. **Note:** To assign the user account with roles used for external systems, select **External Systems**, and select any roles that apply. Roles assigned to External Systems do not grant access to any PowerSchool school or district regardless of the PowerSchool Security Group. **Note:** You can also press SHIFT while selecting multiple schools, which automatically selects all schools between your first and last selection.

	2. Click **Next**.
Step 2: Roles	1. Select one of the following options: • **Use Default Assignment and Roles Without Security Groups**: This allows assignment of roles that identify the user to an external application while preserving the user's default security group access in PowerSchool. • **Use All Roles**: This allows assignment of roles with an associated PowerSchool security group and roles without an associated security group. • **Use Roles Without Security Groups**: This allows assignment only of roles without an associated PowerSchool security group. **Note:** If no role is selected, the user's Default Group designates the access for the administrative portion of PowerSchool for that school. If a role is selected, the Security Group associated to the role overrides the Default Group for the user account while signed in to that school. 2. Select the checkbox next to each role you want to assign to this staff member. **Note:** The security group associated to the role appears in parenthesis. **Note:** You can also press SHIFT while selecting multiple roles, which automatically selects all roles between your first and last selection. 3. Click **OK**.

Note: Once all roles have been assigned, the **Add** button appears shaded.

6. Click **Submit**. A confirmation message appears and the role assignments display on the page.

How to Edit a Role Assignment

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Under Roles and Schools, click the **Edit** icon for the school, which you want to edit role assignments. The Edit User Access Roles pop-up appears.
5. Select one of the following options:
    - **Use Default Assignment and Roles Without Security Groups**: This allows assignment/removal of roles that identify the user to an external application while preserving the user's default security group access in PowerSchool.
    - **Use All Roles**: This allows assignment/removal of roles with an associated PowerSchool security group and roles without an associated security group.
    - **Use Roles Without Security Groups**: This allows assignment/removal only of roles without an associated PowerSchool security group.

    Note: If no role is selected, the user's Default Group designates the access for the administrative portion of PowerSchool for that school. If a role is selected, the Security Group associated to the role overrides the Default Group for the user account while signed in to that school.

6. Do one of the following:
    - Select the checkbox next to each role you want to assign to this staff member.
    - Deselect any roles that you want to remove from this school assignment.

      Note: The security group associated to the role appears in parenthesis.

      Note: You can also press SHIFT while selecting multiple roles, which automatically selects all roles between your first and last selection.

7. Click **OK**.
8. Click **Submit**. The updated role assignment appears.

How to Delete a Role Assignment

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.

3. Click the **Admin Access and Roles** tab.
4. Under Roles and Schools, click the **Delete** icon of the school for which you want to remove all access. The school appears shaded.
5. Click **Submit**. The updated school list appears.

Set Page-Level Permissions

To define each user group's access to individual pages within PowerSchool, use the page permissions function. For detailed information, see *Page-Level Permissions*.

Applications

Assign access to different PowerSchool applications on the Applications tab.

How to Assign Application Access

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Applications** tab.
4. Use the following table to confirm and enter information in the fields:

Field	**Description**
PowerTeacher Administrator	Select the checkbox if you want this staff member to be able to sign in to PowerTeacher Administrator.
ReportWorks Developer	Select the checkbox if you want this staff member to be able to sign in to ReportWorks. To launch ReportWorks, see *How to Launch ReportWorks Developer*.
Oracle Application Express Account (APEX)	Select the checkbox if you want this staff member to be able to sign in to the APEX Builder application. **Note:** To reset the password, deselect the checkbox, submit, and then re-select the checkbox.

	Note: If this account has been locked in APEX, deselect the checkbox, submit, and then re-select the checkbox.

2. Use the following table to enter information in the APEX Settings section:

Field	Description
PowerSchool Username	The staff member's PowerSchool username.
First Name	The staff member's first name.
Last Name	The staff member's last name.
Email	The staff member's email address.
Password	Enter the staff member's password.
Confirm Password	Enter the staff member's password again.

3. Click **Submit**. A confirmation message appears.

Work With Individual Staff Members

PowerSchool provides you with the ability to work with staff member user accounts, including editing the account information, add a photo, setting the staff schedule, view fee transactions, and more.

Staff Page Layout

Each view or menu item on the Staff page looks different, but the top of each displays the name of the page and staff member. Look at the staff pages menu on the left side of the screen. All of the items listed are either possible actions performed or items viewed on a staff member's record. This is where you will start the activities described in this section.

Use the following buttons and links to help you find the staff records you need:

- **Staff Search**: Displays a search field to look for other staff records.
- **List**: Displays the current selection of staff members on the Select a Staff Member page.
- **Previous Record** arrow: Displays the record preceding the selected record.
- **Next Record** arrow: Displays the record following the selected record.
- Remaining links indicate possible actions to be performed on the selected record.

Staff Information

After selecting a staff member, you can edit information about that person. When a staff member no longer works at your school, indicate an inactive status for that person. For more information about adding staff members, see *How to Add a New User*.

How to Edit Staff Information

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Information** from the staff pages menu. The Information page appears.
3. Use the following table to edit information in the fields:

Field	**Description**

Name	Enter the staff member's last, first, and middle name.
Preferred Name	Enter the staff member's preferred name, such as a nickname.
Email Address	Enter the staff member's email address.
Title	Enter the staff member's role or professional title.
Gender	Indicate the staff member's gender by choosing either **Male** or **Female** from the pop-up menu.
Ethnicity	Specify whether or not the staff member is Hispanic or Latino by selecting the appropriate option. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*.
Race	Specify the staff member's race by selecting the appropriate checkboxes. **Note:** Information that appears may vary based on your configuration. For information about setting up federal ethnicity and race categories and codes used in state-specific reporting, see *Federal Race Categories* and *District Race Codes*. **Note:** Field level security may be used to restrict this information (TEACHERRACE.RACECD and USERS.FEDRACEDECLINE). For more information, see *Field Level Security*.
Reporting Ethnicity	Specify the staff member's ethnicity by choosing the appropriate ethnicity from the pop-up menu. **Note:** Information that appears may vary based on your configuration. For information about setting up ethnicity codes used in scheduling and preconfigured reporting, see *Scheduling/Reporting Ethnicity Codes*.
ID	Enter the staff member's identification number (required).

Homeroom	Enter the staff member's homeroom number.
Home School	Displays the designated home school for the teacher. For more information, see *How to Edit Staff Member Security Settings*.
Lunch ID	Enter the staff member's PowerLunch identification number. For more information, see *How to Create Lunch ID Numbers for Staff*.
Home Phone #	Enter the staff member's home telephone number.
School Phone #	Enter the staff member's school telephone number.
Street	Enter the staff member's street name.
City, State, Zip	Enter the staff member's city, two-letter state abbreviation, and postal code.
SSN	Enter the staff member's Social Security Number.
DOB	Enter the staff member's birth date.
Staff Type	It is recommended that a status is assigned to each staff member. This makes searching for and selecting staff members more efficient. To specify the staff member's status, choose one of the following from the pop-up menu: • **Not Assigned** • **Teacher** • **Staff** • **Lunch** • **Substitute** **Note:** For a user to appear in PowerSchool's teacher's pop-up menus, **Teacher** must be selected.
Status	Specify the staff member's status by choosing **Current** or **No longer here** from the pop-up menu. If you choose **No longer**

	here, the staff member's PowerSchool account is inactive, and he or she cannot access PowerSchool.

4. Click **Submit**. The Edit Information page appears.

Consolidate User Accounts

You can merge multiple user accounts into one account. If you have staff members who teach at multiple schools, PowerSchool used to require a different user account for each school. Now, you can consolidate the multiple accounts to one account and assign different schools and user rolls to a single account.

How to Consolidate Users

Be sure to verify which staff member record will serve as the master record before searching for staff members and consolidating users. The consolidation process is non-reversible.

Note: This procedure may only be performed at the district level.

1. On the start page, search for and select all of the records for a staff member. Only a single record for each school may be selected. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Consolidate Users**. The Consolidate Users page appears. Verify that all of the accounts that appear belong to the same user.

   Note: If incorrect accounts appear on the page, refine the search selection, and repeat Steps 2 and 3.

4. Click the **Master** option to select the staff member account that will serve as the master user account.
5. Click **Submit**.
6. Click **Confirm Submit**. A confirmation message appears, and the staff user accounts are merged into the selected user account.
7. On the start page, search for the staff member user account you just consolidated.
8. Click **Security Settings** on the main menu. The Security Settings page appears.
9. Verify the information on the page. For more information, see *How to Edit Staff Member Security Settings*.
10. Click the **Role Assignment** tab. Verify the User Access Roles assigned to each school. For more information, see *Role Assignments*.

Staff Current Schedule

View the schedule for a specific teacher. You can view a teacher's current schedule from either the Staff page or the main menu. To view teacher schedules from the main menu, see *Teacher Schedules*.

When viewing a teacher's schedule from the Staff page, you can view the schedule in either a table or a matrix format.

You can also view PowerTeacher Pro for the selected teacher in read-only mode.

How to View PowerTeacher Pro in Read-Only Mode via Teacher Schedules

1. On the start page, select **Teacher Schedules** form the main menu.
2. Select a teacher. The teacher’s current schedule appears.
3. Click the **PowerTeacher Pro** button to launch a read-only version of the application.

How to View PowerTeacher Pro in Read-Only Mode via Current Schedule

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. Select **PowerTeacher Pro** from the staff pages menu to launch a read-only version of the application.

How to View Teacher Schedules From the Staff Page

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Current Schedule** from the staff pages menu. The selected teacher's schedule appears.
3. On the Teacher Schedule page, you can do the following:

Field	Description
Display today’s sections	Select the checkbox to display only those sections for which the teacher has an active role for the current day. Deselect the checkbox to view all sections for which the teacher has an active role for the selected term.

New	Click to add a section to the teacher's schedule. The Create New Section page appears. For more information, see *How to Add Sections to Teacher Schedules*.
Term	Click to view term information for this section. The Term page appears.
Course	Click the name of the course to view basic course information. The Course Information page appears.
Section #	Click to view information about this section. The Edit Section page appears. For more information, see *Sections*.
Enrollment	Click to display the section's class roster. The Class Roster page appears. For more information, see *How to View the Class Roster*.
Attendance	Click the **chair icon** to record meeting attendance for a specific date. This icon only appears if attendance can be entered for the date or term. For more information, see *Record Meeting Attendance by Section for a Specific Date*. Click the **grid icon** to record meeting attendance for a specific date range. This icon only appears if attendance can be entered for the date or term. For more information, see *Record Meeting Attendance by Section for a Date Range*.
Analytics	Click to view Analytics data. For more information, see *View Analytics Data*. **Note:** The Analytics icon only appears if Analytics is enabled. For more information, see *Enable Analytics*. **Note:** The data that appears on the graph is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

Make all student listed above the current selection	Click to work with the group of students in all of the selected teacher's classes listed in the schedule. The Group Functions page appears. For more information, see *Work With Groups*.

How to View the Teacher Schedule Matrix

The schedule matrix graphically represents a teacher's schedule for all days, periods, and terms in the currently selected year.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Schedule Matrix** from the staff pages menu.
3. To narrow the information that appears on the schedule matrix, use the following table to enter information in the Filter section:

   Note: Click the arrow to expand this section. Click the arrow again to collapse this section.

Field	Description
Co-Teacher Sections	Choose one of the following: • **Show** to include any co-teacher sections in the schedule matrix. • **Hide** to exclude any co-teacher sections in the schedule matrix. **Note: Show** is the default setting.
Only Display Current Sections	Choose one of the following: • **Yes** to display only those sections for which the teacher has an active role for the current day. • **No** to view all sections for which the teacher has an active role for the selected term.

The Schedule section refreshes and displays the teacher's schedule for each period and day in each term. Identical colors on the schedule indicate the same section. A blank block

means that nothing is scheduled for that block in that term.
Each block includes the following information:

- Course name
- Course number
- Section number
- Room number
- Schedule expression, which is the combination of periods and days
- Term taught
- Current/maximum enrollment

How to Add Sections to Teacher Schedules

1. On the start page, choose **Teacher Schedules** under Functions in the main menu. The Teacher Schedules page appears.
2. Click the name of the staff member. The selected teacher's schedule appears.
3. Click **New**. The Create New Section page appears.
4. Use the following table to enter information in the fields:

Field	Description
Course Number	Enter the course number.
Expression	Select the checkboxes for the combination of days and periods in which this section meets. For example, select the checkbox for **Period 1** and **Day A** if a section of Chemistry meets during first period on A days.
Teacher	The selected teacher appears.
Room	Enter the room in which this course section meets.
Section Number	Enter the section number in this field. Do not enter special characters. **Note:** Section numbers must be unique among sections of the same course for a given school year.

Term	Choose the appropriate term from the pop-up menu.
Grade Level	If this course is available only for a certain grade level, enter the grade level. Otherwise, leave this field blank.
Grade Scale	Choose the grade scale from the pop-up menu. For more information, see *Grade Scales*.
Maximum Enrollment	Enter the maximum number of students who can enroll in this course section.
Where Taught	If this course section is taught outside your school, enter the school's ID in this field. If it is taught at your school, leave this field blank.
Dependent Sections	If this course section has dependent sections, enter them in this field using the course.section, course.section format. If a student is enrolled in a class, it is not teacher-specific, but rather section-specific. Often used by elementary schools where students take a set of classes, dependent sections indicate that if a student is registered in one class, he or she must also register for the dependent class. If the dependent section conflicts with another class, you can manually drop the student from the class and add him or her to another section. This function has no implications with prerequisites or graduation requirements.
Record Attendance Using Attendance Mode	Use the pop-up menu to indicate the method by which you want attendance recorded. At this time, Meeting attendance is your only option.
Record Attendance	If the section meets more than one period in a day, you can choose to take attendance once or for every period by selecting the **Once for All Meetings** option or the **Each Meeting Separately** option.
Exclude From Attendance	Select the checkbox if you do not want attendance and enrollment in this section to be counted towards any ADA/ADM calculations.

5. Click **Submit**. The Teacher Schedule page displays the new section.

Staff Photos

This page displays a photo of the staff member. If no photo is available, you can submit a photo for the staff member. The selected photo appears next to the selected staff member's name at the top of each staff page. Click the photo to view a larger version of the photo.

How to Submit a Staff Photo

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Photo** from the staff pages menu. The Teacher Photo page appears. If a photo is available, it appears in the center of the page.
3. Click **Submit a New Photo for [staff member]** to change or add a photo for a staff member. The Submit Photo page appears.
4. Click **Choose File**. The Open dialog appears.
5. Locate and double-click the file. The Submit Photo page appears.

   Note: The photo must be in JPEG format.

6. Click **Submit**. The Teacher Photo page displays the staff member's photo.

How to Delete a Staff Photo

Use this procedure to delete student photo.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Photo** from the staff pages menu. The Teacher Photo page appears.
3. Click **Delete**.
4. Click **Confirm Delete Photo**. The Teacher Photo page no longer displays the teacher's photo.

Staff Schedule Setup

Use this page to edit scheduling information for the selected staff member.

How to Edit Staff Schedule Setup

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Schedule Setup** from the staff pages menu. The Staff Scheduling Preferences page appears.
3. Use the following table to enter information in the fields:

Field	Description
Department	Click **Associate** to select this teacher's department.
Preferred Room	Click **Associate** to select this teacher's classroom. The system always attempts to schedule courses assigned to this teacher in his or her preferred classroom first.
Maximum Consecutive Periods	Choose from the pop-up menu the maximum number of periods this teacher can teach in a row (according to his or her contract).
Maximum Periods Free	Choose the maximum number of free periods this teacher can have in his or her schedule each day from the pop-up menu.
Schedule This Teacher	Select the checkbox if you want the system to schedule this teacher. **Note:** If you deselect the checkbox, the system will not include this teacher in the schedule build process.
Is Always Free?	Select the checkbox to allow this teacher to be scheduled for an unlimited number of courses during the same period. For example, some special education teachers teach different subjects to different students in the same room during the same period.
Building Code (optional)	Click **Associate** to select this teacher's building.
House Code (optional)	Click **Associate** to select this teacher's house.

Team Code (optional)	Choose from the pop-up menu the team to which you want this teacher to belong.
Maximum Student Load	Specify the maximum number of students that a teacher can have per day. For more information, see *Teacher Maximum Load*.

4. Click **Submit**. The Staff Scheduling Preferences page displays the changes.

Staff Transactions

Use this page to view or record any fee-related transactions for the selected staff member. Transactions such as meal purchases automatically appear on the Transactions page. Since PowerLunch records meal purchases, do not use the Transactions page to enter meal purchases.

How to View Staff Transactions

View any debit or credit transactions for the selected staff member. The Transactions page displays the staff member's name, ID, and current balance.

1. On the start page, search for and select a staff member. For more information, see Staff Search.
2. On the Staff page, click **Transactions** from the staff pages menu. The Transactions page displays any financial transactions for the selected staff member:

How to Record Staff Transactions

Use this page to enter transactions such as campus bookstore purchases and payments to staff member accounts. Since PowerLunch records meal purchases, do not use the Transactions page to enter meal purchases.

Transactions cannot be deleted. However, you can reverse a transaction by adding an opposite transaction. For example, if you enter a credit transaction but meant to enter a debit transaction, enter two debit transactions of the same amount. Enter in the Description field text such as "Reverse accidental credit transaction" for one of the debit transactions.

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.

2. On the Staff page, click **Transactions** from the staff pages menu. The Transactions page displays any financial transactions for the selected staff member.
3. Click **New** to record a new transaction. The Transaction Record page appears.

   Note: Do not manually record transactions that are normally automated transactions, such as PowerLunch Quicksales. For more information, see *PowerLunch*.

4. Use the following table to enter information in the fields:

Field	**Description**
Date of Transaction	Enter the transaction date using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Description	Enter a description for the transaction. Only the first 24 characters and spaces of the description appear on the Transactions page.
Debit	Enter an amount for the transaction to decrease the balance on the staff member's account. If you enter a debit, do not enter anything in the Credit field. Record credit transactions separately.
Credit	Enter an amount for the transaction to increase the balance on the staff member's account. If you enter a credit, do not enter anything in the Debit field. Record debit transactions separately.

5. Click **Submit**. The Transactions page displays the new transaction.

Analytics Teacher View

The Analytics Teacher View page displays Analytics teacher data. This menu link only appears if Analytics is enabled. For more information, see *Enable Analytics.*

Note: The data that appears on the page is not served by PowerSchool. It is rendered from a separate Analytics server. For more information on the configuration of Analytics, see the Analytics documentation.

How to View Analytics Teacher Data

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Analytics Teacher View** from the staff pages menu. The Analytics Teacher View page appears.

   Note: You can also access the Analytics Teacher View from the Teacher Schedule page. For more information, see *Staff Current Schedule*.

Staff Custom Screens

PowerSchool administrators design custom screens to display a variety of information about staff members. There is no limit to the number of custom screens that a school can set up to track any kind of information. Thus, the pages are school-specific and will differ from the examples. After selecting a staff member and clicking **Custom Screens**, a list of custom screens at your school appears.

For more information about creating custom screens, see *Custom Staff Fields and Screens*.

How to View Staff Custom Screens

1. On the start page, search for and select a staff member. For more information, see *Staff Search*. A list of custom screens appears.

   Note: Your PowerSchool administrator can modify this page or create new ones to meet your school's needs.

2. Click the links to the pages, if available. The custom screen appears.

Work With Staff Groups

Using the Group Staff Functions page, you can manage records for a selected group of staff members in a variety of ways.

Copy Database Extensions (Legacy Custom Field Data)

Use this page to copy the selected Staff Member(s) database extensions (legacy custom field data) from their designated Home School to the currently selected staff record.

How to Copy Database Extensions (Legacy Custom Field Data)

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Copy Legacy Custom Field Data**. The Copy Legacy Custom Field Data page appears.
4. Click **Submit**.
5. Click **Confirm Submit**. The legacy custom field data will now appear on all selected staff records.

Export Staff Using Template

Using a template, export staff data for the currently selected staff members.

How to Export Staff Using Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Export Using Template**. The Export Using Template page appears.
4. Choose the template from the Export template pop-up menu.
5. Click **Submit**. The exported staff information page appears.

List Staff Members

Use this page to generate a printable report of the currently selected staff members.

How to List Staff Members

1. On the start page, search for and select a group of staff members. For more information, see Staff Search.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **List Staff Members**. The List Staff Members page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Report Title	Enter a report title.
Col.	Numerical representation of the number of items that will appear on the list.
Field Name	Enter the name of the field. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** To number the staff members on the printed list, enter ***count** in the Column 1 **Field Name** field.
Column Title	Enter the column title. This may or may not be the same as the field name. For example, to display birthdays on the printed list, title the column as **Birthday** even though the field name is **DOB**.
Padding in Each Cell	Enter the amount of space between the cell and the text in points.

	Note: One point equals 1/72 of an inch.
# Rows in Between Breaks	This refers to the number of staff names to print before each break in the list. After each break, column titles are printed again. Enter **0** if you do not want breaks inserted.
Other Options	Select the **Gridlines** checkbox to draw lines between rows and columns and to put a border around the list. Select the **Export** checkbox to create the list in another application. If you deselect the checkbox, the list appears in your Web browser only.
Optional: Sort Field Name	Enter up to three field names to sort items in the selected columns or fields. For each field, choose indicate the sort order by choosing ascending (**>**) or descending (**<**) from the **Directions** pop-up menu. If you select to sort more than one column/field, PowerSchool sorts them in the order listed. **Note:** If you have never sorted a list before, it is a good idea to try different options here to view how list items are ordered each time.

5. Click **Submit**. The page displays the list. If it is formatted correctly, continue to the next step. If not, click **Back**, make the necessary changes, and click **Submit** again to preview the revised list.
6. Click your Web browser's Print button to print the report.

   Note: To fit more staff members on the page, change the paper layout or use the reduction setting on your Web browser. Choose **File** > **Print**. Make the appropriate selections in the Print dialog.

Print Staff Mailing Labels

Prints mailing labels for the currently selected staff members. Set up the mailing label layouts for staff from the same area as the student mailing labels. For more information, see *Mailing Labels*.

How to Print Staff Mailing Labels

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Print Mailing Labels**. The Print Mailing Labels page appears.
4. Use the following table to enter information in the fields:

Field	Description
Print Mailing Labels For	Select an option to indicate the staff members for whom the report will be run, if necessary.
Use this mailing label layout	Choose a mailing label layout from the pop-up menu. Click **mailing label layout** to view, add, or edit a mailing label layout. For more information about mailing label layouts, see *How to Add a Mailing Label Layout*.
How Many Pages?	Select an option to indicate the number of pages to print.
When to print	Select a time to run the report: • **ASAP**: Execute immediately. • **At Night**: Execute during the next evening. • **On Weekend**: Execute during the next weekend. • **On Specific Date/Time**: Execute on the date and time specified in the following fields.

5. Click **Submit**. The report appears with the specified parameters. Review it from beginning to end to verify that the formatting and content are correct.

   Note: If you are ready to print the labels, see *Run, Print, and Save Reports*.

Print a Staff Report

Use this page to print reports for the currently selected staff members. Set up the report layouts from the same area as the student reports. For more information, see *Form Letters*.

How to Print a Staff Report

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Print a Report**. The Print A Report page appears.
4. Use the following table to enter information in the fields:

Field	**Description**
Which report would you like to print?	Choose the form letter from the pop-up menu.
For which staff members?	Select an option to indicate the staff members for whom the report will be run, if necessary.
Print only the first X pages	If you only want to print a limited number of pages, select the checkbox and enter the number of pages.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the **Which report to would you like to print** field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the **Date Range**, enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose a standard phrase or select Custom and enter the text you want to print as a watermark in the field.
Watermark Mode	Choose how you want the text to print from the pop-up menu. Watermark prints the text behind objects on the report, while Overlay prints the text over objects on the report.
Report Output Locale	Select the locale from the pop-up menu. The report output will be in the language associated with the locale.

	Note: When generating object reports, certain report text may appear in the default English language. For more information, see *Object Reports*.

5. Click **Submit**. The report appears with the specified parameters. Review it from beginning to end to verify that the formatting and content are correct.

   Note: If you are ready to print the report, see *Run, Print, and Save Reports*.

Quick Export Staff

Use this page to quickly export staff data for the currently selected staff members.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Export**.

How to Quick Export Staff

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Quick Export**. The Quick Export page appears.
4. Use the following table to enter information in the fields:

Field	Description
[Export Staff]	Enter the fields to be included on the exported spreadsheet. Enter as many fields as you want. Separate multiple fields with spaces. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears.

Field Delimiter	Choose a field delimiter from the pop-up menu. The field delimiter is the item that separates fields in the exported data. If you select **Other**, enter the delimiter in the blank field.
Record Delimiter	Choose the record delimiter from the pop-up menu. This refers to the item that will separate the records in the exported data: • **CR**: carriage return • **CRLF**: carriage return line feed • **LF**: line feed If you select **Other**, enter the delimiter in the field.
Surround Fields	Select the checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select the checkbox to include column titles on the first row of the exported data.

5. Click **Submit**. Either save the file to a specified location or open the file to display the report in a spreadsheet application.

Set Staff Field Value

Use this page to change the value of the selected field for all of the currently selected staff members.

Note: For detailed information about PowerTeacher gradebook administration and setup, see the *Enable PowerTeacher for a Selection of Teachers* section in the *PowerTeacher Gradebook Administrator Installation and Setup Guide* available on PowerSource.

How to Set Staff Field Value

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.
3. Click **Set Staff Field Value**. The Teacher Field Value page appears.
4. Use the following table to enter information in the fields:

Field	Description
Field to Change	Enter the name of the field to be changed. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears.
New Field Value	Enter the new value of the field. Put quotation marks around any values that do not perform calculations, such as constant characters or a string of characters.
Clear Field Value	Select the checkbox if you want to remove any existing values for that field.
Do not overwrite existing data	Select the checkbox if you do not want the system to overwrite any existing field values.

5. Click **Submit**. When the operation is complete, click **Back**. Now you can perform a search to find the group with the changed value.

Perform Staff LDAP Directory Synchronization

Use the LDAP Directory Synchronization page to synchronize PowerSchool Usernames with an LDAP directory server.

Note: For more information about LDAP, see *LDAP*.

How to Perform Staff LDAP Directory Synchronization

1. On the start page, search for and select a group of staff members. For more information, see *Staff Search*.
2. Click **Functions**. The Group Staff Functions page appears.

3. Click **LDAP Directory Synchronization**. The LDAP Directory Synchronization page appears.
4. Edit the User ID Attribute as needed.
5. Click **Submit**.

Select a Group of Teachers by Hand

For detailed information, see *Staff Search*.

Run the Data Validation Report for Teachers

For detailed information, see *Run the Data Validation Report*.

Run the Teacher Schedule Report

The Teacher Schedule Report allows you to produce and print teacher schedules for the current year with page breaks between teachers. Though this report can be viewed with Safari for Mac OS X and Microsoft Internet Explorer for Windows, other browsers may not appropriately display the report formatting.

Tips for printing this report:

- Enable the printing of backgrounds. Shading and colorations in reports are all considered backgrounds. Not printing backgrounds may lead to illegible printouts.
- Turn off the printing of header information in your browser settings. If this is not off, each page printed may include the URL of this page, a page number, and a time stamp. These are generally not desired for this report.
- Use your browser's Print Preview function to confirm that the output is correct prior to sending to the printer. You may adjust text size using the text font size controls of your browser. You may also control the page orientation using your browser settings to fix table cells that span page breaks or reports that print too small.

How to Run the Teacher Schedule Report

1. On the start page, search for and select a group of staff members. For more information, see Staff Search.
2. Click Functions. The Group Staff Functions page appears.
3. Click Teacher Schedule Report. The Teacher Schedule Matrix Report page appears.
4. Use the following table to enter information in the fields:

Field	Description
Report Title	Enter a title for the report.
Teachers to scan	Select an option to indicate the teachers to include, if applicable.
Max Teachers per Page	Enter the maximum number of teachers to display per page.
Sort Order	Select an option to indicate the sort order.
Bell Schedule for Period Start/End Times	Select from the pop-up menu which bell schedule to use to display the start and end times for each period.
Include Co-teaching Sections	Select the checkbox to include all sections for which the teacher has an active role for the current term.
Display Only Today's Co-teaching	Sections Select the checkbox to display only those sections for which the teacher has an active role for the current day. Deselect the checkbox to view all sections for which the teacher has an active role for the current term.

5. Click **Submit**. The Teacher Schedule Report appears.