PowerSchool

PowerSource Administrator's Guide

A guide for using PowerSource to request instructor-led training.

CUSTOMER EDUCATION

Contents

PowerSource Administrator's Guide

Use this guide to understand how to use PowerSource to request instructor-led courses.

Getting Started

PowerSchool-authorized technical contacts' PowerSource accounts are created during implementation. The number of PowerSchool-authorized technical contacts you are allowed to have depends on the products your organization uses. If you are a technical contact and do not have a PowerSource account, first check with the other technical contacts in your organization to see if they have accounts so that they can create one for you. Existing technical contacts can manage your organization's technical contacts and products through the Customer Connect portal on PowerSchool Community. Additionally, you can contact your PowerSchool Application Specialist or the PowerSchool Technical Support team for assistance.

Once the technical contacts have access to PowerSource, it is their responsibility to create the user accounts for other staff members in their organization, either manually, by importing them in bulk, or by allowing users to self-register. The three methods for creating PowerSource user accounts are outlined below.

Creating PowerSource User Accounts

You have three options when creating non-technical contact user accounts in PowerSource. The method you choose depends on the number of accounts you must create to accommodate the size of your school or district.

Note: If the user is a technical contact, manage that account through the Customer Connect portal on PowerSchool Community.

Method 1 – Add Users Manually

1. To sign in to PowerSource, enter your username and password and select **Login** at ***https://support.powerschool.com***
2. On the PowerSource Home page, select the **Account Management** tab
3. Select **Add User**
4. Complete the required fields (indicated with an asterisk)
5. In the Permissions section, select **Can enroll users in Instructor-Led Training** and any additional options that apply

   Note: If you prefer to enroll users in trainings, do not select this checkbox.
6. In the Site Access section, select **Allow access to the PowerSource site**
7. Select **Allow access to the PowerSchool University (PSU) site** so that the user can register for PowerSchool University training conferences
8. Select **Submit**
9. Repeat steps 3–8 for each staff/faculty member

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Method 2 – Import Users

1. Prepare an import text file (.txt) using a spreadsheet application such as Microsoft Excel, or by downloading the Excel sample import template here: https://support.powerschool.com/home/account-management/import.action
2. Include the following fields:
   - Email
   - First Name
   - Last Name
   - Role

     Values for the Role field must be one of the following: Accounting/Finance, Counselor, Curriculum Director, Health Office Staff, Human Resources, Office/Administrative Staff, School/District Administrator, Teacher, or Technical Staff.
   - Training

     The value in the Training field should be "true" (lowercase and without quotes) in order for your staff to enroll themselves or other users into instructor-led courses under the training calendar.
   - PowerSource

     The value in this field should be "true" (lowercase and without quotes) in order for your staff to access PowerSource.
   - Optional columns

     To import additional settings, review the definitions of the "Optional columns" you can include in the import file here: https://support.powerschool.com/home/account-management/import.action
3. To sign in to PowerSource, enter your username and password and select **Login** at ***https://support.powerschool.com***
4. Select **Account Management** and then choose **Import Users**

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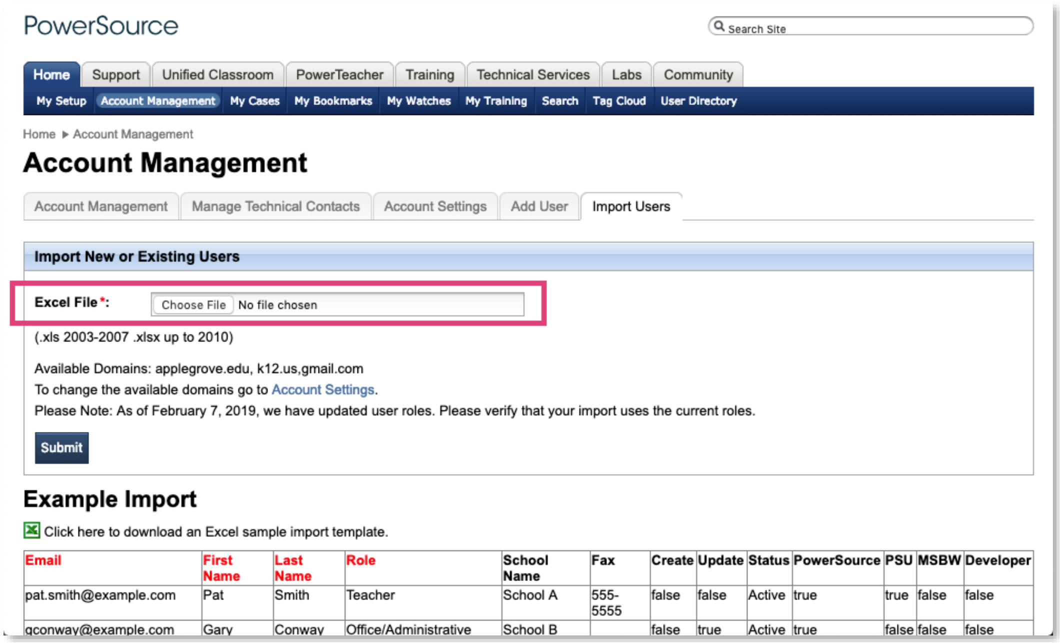
5. Select **Browse** or **Choose File** and choose the text file you created



6. Select **Submit**

   Note: You cannot import user accounts with email addresses that do not match your account's valid email domain(s). If you import a user who already has a PowerSource account for your school or district, the existing record will be updated.

Method 3 – Allow Staff/Faculty to Self-Register

1. To sign in to PowerSource, enter your username and password and select **Login** at ***https://support.powerschool.com***
2. Select **Account Management**
3. Select **Account Settings**

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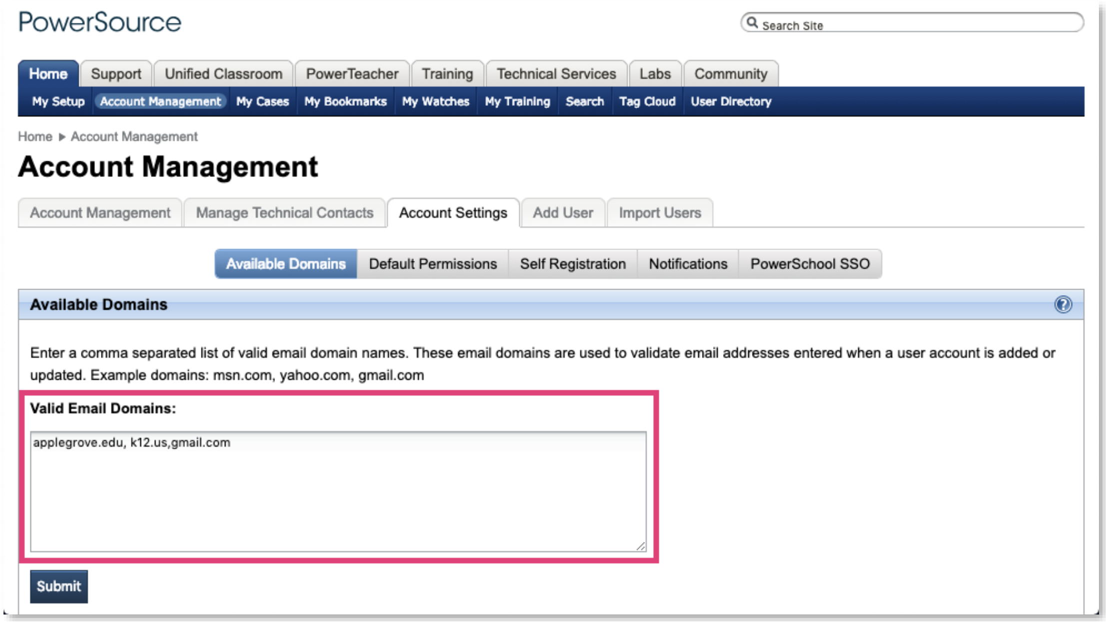
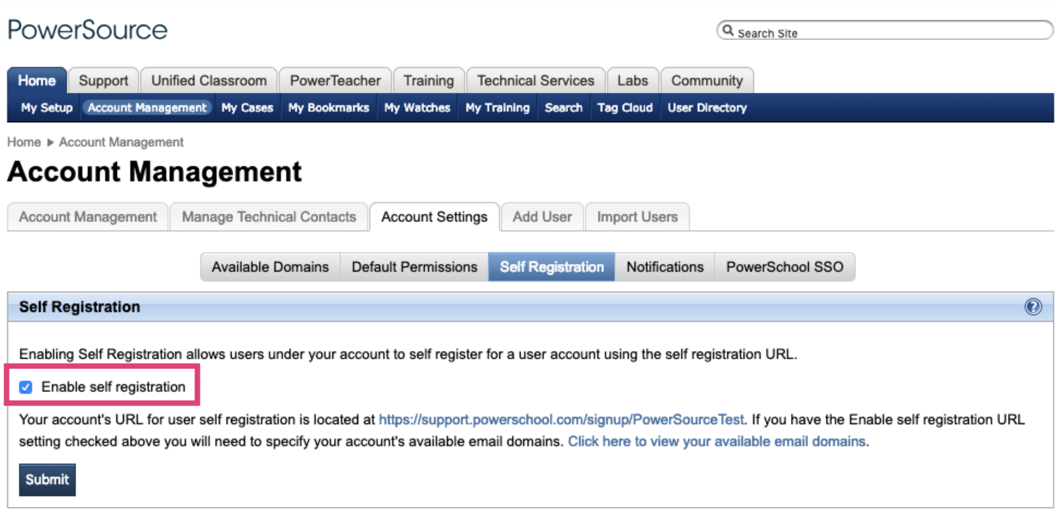
4. On the **Available Domains** tab, enter a comma-separated list of your account's valid email domains (example: ***districtname.k12.wi.us, districtname.org, charterorg.org***)



5. Select **Submit**
6. Select **Default Permissions**
7. From the options, choose **Can enroll users in Instructor-Led Training**
8. Select **Submit**
9. Select **Self Registration**
10. To allow users to create their *own* accounts, choose **Enable self registration**



11. Select **Submit**

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12. Provide your staff/faculty with the district-specific, self-registration URL, available near the bottom of the Account Settings tab

PowerSchool does not recommend enabling the self-registration feature for your district if users are not assigned email addresses that are specific to your organization's domain. For example, if your staff or faculty use gmail.com or yahoo.com email accounts for work, and the self-registration portal is enabled, anyone with a gmail.com or yahoo.com email address can register for a PowerSource account associated with your organization.

For more information about creating PowerSource user accounts, visit: ***https://support.powerschool.com/d/powersource_how_to_create_new_powersource_accounts***

Activating User Accounts

Once a new user account is created, the new user receives a confirmation email with instructions on how to activate his or her PowerSource account. The new user will select the account-activation URL included in the email (the support.powerschool.com link) and will then be prompted to create an account password.

Before you can enroll a staff member in a course, the user must respond to the new account confirmation email and activate their PowerSource account.

- Your district's technical contacts can monitor all the accounts associated with your organization. To view the list of your organization's PowerSource users, on the PowerSource Home tab, click **Account Management**. Users whose information is highlighted in yellow have not activated their PowerSource accounts.

Managing Technical Contacts

Add and manage authorized technical contacts and products through the Customer Connect portal on PowerSchool Community.

Registering for Instructor-led Courses

To register for an instructor-led training course or to complete the registration for your staff members, follow the steps outlined below.

1. Sign in to PowerSource
2. On the PowerSource Home page, select the **Training** tile or the **Training** tab
3. Select **Training Calendar** and use the filters to browse for training offerings by date

   Alternatively, select **Course Catalog** to browse for training offerings by topic. Use the filters to narrow the results and then select **View Offerings**.
4. When you find the course you want, select **Request** to open the Training Request form
5. On the Training Request form, open the **Payment** menu and select the payment type

   Request an invoice, confirm your seat using funds from a legacy purchase order or funds already purchased through your Account Manager, or confirm your seat using PowerPass funds.

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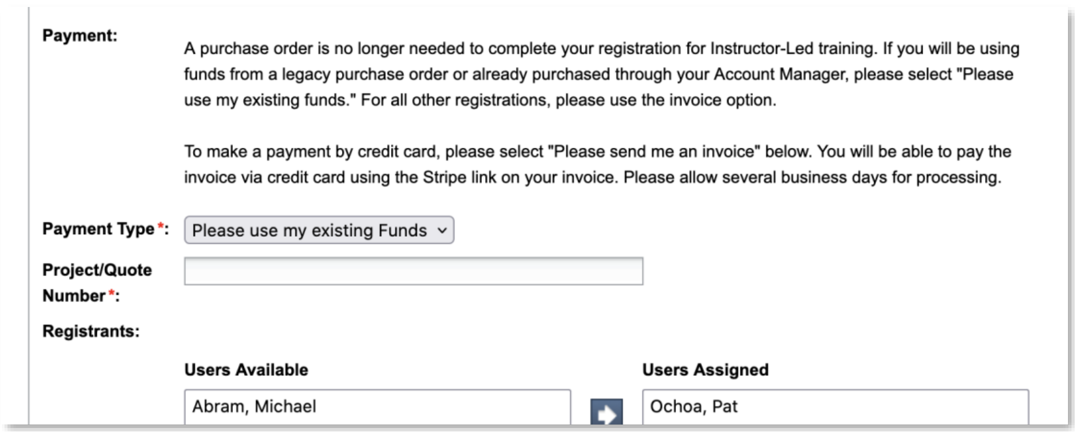
6. If you'd like to use existing funds to pay for the training, enter your project or quote number in the **Project/Quote Number** field
7. Use the **Registrants** fields to select one or more attendees
8. Read and agree to the Terms of Registration and select **Submit**

   The trainer will send all attendees a Zoom link and curriculum shortly before the event. Remember to visit the My Training page in PowerSource to view your scheduled trainings and to download certificates from completed courses.



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