PowerSource User Guide

School Systems

PEARSON

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The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Contents

PowerSource Overview

PowerSource is Pearson's community-focused web site for support, services, downloads, training and more for School Systems products. Unlike traditional web sites that only allow you to receive information, PowerSource leverages the latest Web 2.0 technology, allowing users to not only access, but also contribute resources to the community.
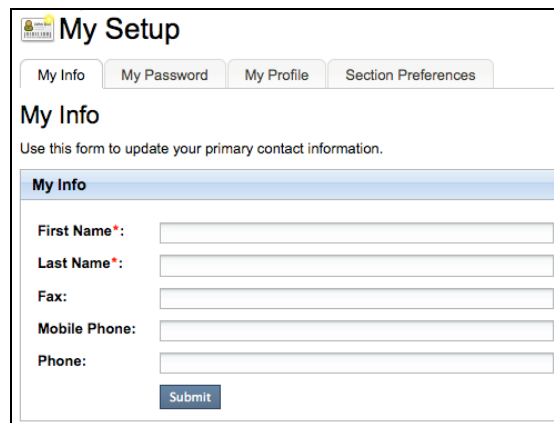
- Find resources by browsing or searching.

- Access product downloads including installers, updates, user guides and more.

- Find product solutions in the knowledgebase.

- Manage Support cases through the self-service portal.

- Provide feedback on existing content through feedback forms, inline discussions, and by voting.

- Contribute resources to the knowledgebase and the Download Center.

- Create accounts for all users at your site, allowing teachers and other staff access to Support resources.

- Purchase and view training content online.

Getting Started

When first accessing PowerSource, the Home page appears. From the Home page, you have access to many tools allowing you to manage your site profile, accounts, bookmarks, watches, training, saved searches, and more to personalize your PowerSource experience.

My Setup

The My Setup page provides the ability to maintain personal information, such as your name, contact information, and PowerSource password.

1. Select the My Setup page below the Home section. The My Setup page appears, with four available tabs: My Info, My Password, My Profile, and Section Preferences.

2. Select the My Info tab to maintain basic contact information, such as your name and phone number.

3. Select the My Password tab to change your PowerSource password and security question.

4. Select the My Profile tab to maintain your site avatar, screen name, signature, and electronic contact information.

5. Select the Section Preferences tab to enable or disable product tabs purchased by your district.

6. Submit each page separately to save any changes.

My Cases

The My Cases page provides the ability to create and maintain Support cases.

Note: You must be registered as an authorized technical contact to manage your site's cases.

1. Select the My Cases page below the Home section. The My Cases page appears, with three available tabs: Recent Cases, All Cases, and New Case.

2. Select the Recent Cases tab to view your 50 most recent Support cases.

3. Select the All Cases tab to view all of your Support cases.

4. Select the New Case tab to create a new case.

5. If you are registered as a technical contact for multiple accounts (districts or organizations), select the account for which you are submitting a new Support incident.

6. Enter a Subject related to the issue.

7. Populate the remaining fields appropriately.

8. Submit the page.

9. The Recent Cases list appears.

10. To view the details of a case, select the Subject line.

11. To exit the case, select "Back to cases."

My Bookmarks

The My Bookmarks page provides the ability to view and delete PowerSource page bookmarks. Use the bookmarks to quickly access a PowerSource page.
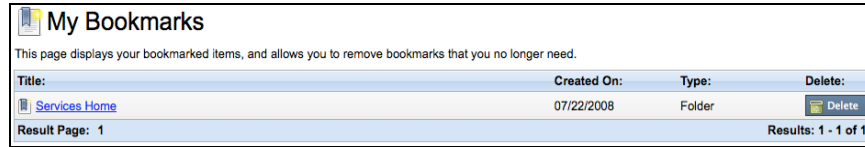
1. Select the My Bookmarks page. The My Bookmarks page appears.

2. To view one of the bookmarked PowerSource pages, select the name of the page.

3. To delete a bookmark, select the Delete button.

For information on how to add a PowerSource page to your Bookmarks, please refer to the "Bookmark" section.

My Watches

The My Watches page provides the ability to view and delete PowerSource webpage watches. Use Watches to remain updated on changes to a PowerSource page. When a page you are watching is updated, you will receive email notification of the update.
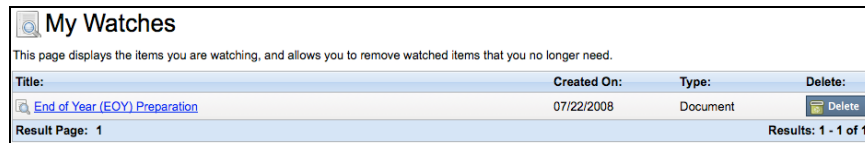

1. Select the My Watches page. The My Watches page appears.

2. To view one of the "watched" PowerSource pages, select the name of the page.

3. To delete a watch, select the Delete button.

For information on how to add a PowerSource page to your Watches, refer to the "Watch" section.

My Training

The My Training page provides information on the training classes and events requested by your district.
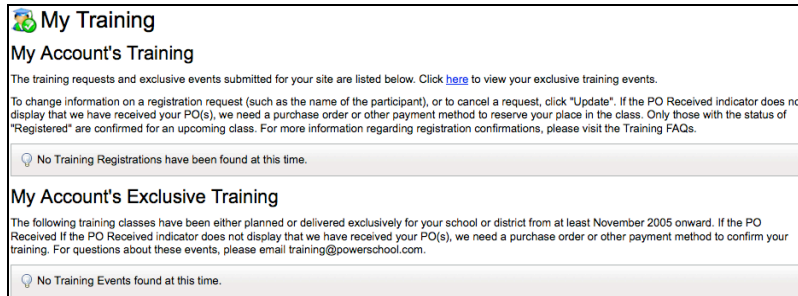
1. Select the My Training page. The My Training page appears.

2. View individual event registration under My Account's Training.

3. View any site-exclusive training events under My Account's Exclusive Training.

My Saved Searches

The My Saved Searches page provides the ability to view and delete PowerSource saved searches. A search can be added to your Saved Searches list to easily repeat a frequently used search query.
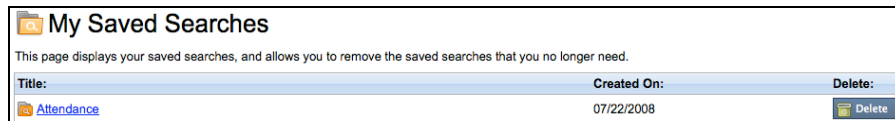
1. Select the My Saved Searches page. The My Saved Searches page appears.

2. To perform a saved search, select the name of the search.

3. To delete a saved search, select the Delete button.

For information on how to save a search to your Saved Searches, refer to the "Save Search" section.
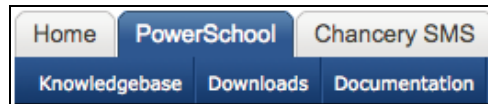
Finding Resources

Product Support Resources

Support resources are available within each product section and are organized into the following three categories: Knowledgebase, Documentation, and Downloads.

- **Knowledgebase** - The Knowledgebase contains a collection of articles and download to support the usage and troubleshooting of School Systems products.
- **Documentation** - The Documentation folder contains user guides, release notes, system requirements, and other downloadable documents for School Systems products.
- **Downloads** - The Downloads folder contains product installers, updates, and other downloads for School Systems products.

Note: The Product sections available to you are based on the School Systems products purchased by your district or organization.

Training Resources

Training resources for all School Systems products can be found in the Training section. If you are authorized to purchase training courses or events, visit the Training section.

Services Resources

The Services section includes information for all product services including Implementation services, Customization services, and Consulting services.

Community Resources

The Community section includes community-submitted resources in the Download Center. Visit this section to view, download, and provide feedback on community-submitted resources.

Searching

PowerSource provides two search methods for locating resources: Basic Search and Advanced Search. After performing a basic or advanced search, the search arguments can be saved for later use.

Basic Search

To perform a basic search with a series of key words, use the Search Site field located in the upper right hand corner of PowerSource. This basic search returns resources that match any of the submitted key words.

Q Search Site

1. Locate the Search Site field in the upper-right corner of the screen.

2. Enter one or more search terms.

3. Press the "Enter" or "Return" key to begin the search. The Search Results page appears.

4. Sort the search results by ID, Title, Votes, Section, Type, or Published date.

5. Select a resource title to access a resource in the search results.

Note: When performing a simple search, if an integer is entered as the only search argument, PowerSource only searches resources based on the folder or document ID.

| ID:	Title:	Votes:	Section:	Type:	Published:
395	Attendance Summary by Grade This folder contains resources related to the **Attendance** Summary by **Grade** report.	+1 vote	PowerSchool	Folder	06/17/2008
349	Search by Grades/Attendance This folder contains resources related to the Search by **Grades/Attendance** report.	+1 vote	PowerSchool	Folder	06/18/2008
6804	Attendance for Students by **Grades/Attendance**...User Guide for PowerSchool version 4.2.1. Last updated 090204. **Attendance** User Guide PowerSchool Student Information System **Attendance** User Guide Introduction © 2005 Apple Computer, Inc. All rights	+1 vote	PowerSchool	PDF	06/04/2008

Advanced Search

The Advanced Search enables users to return more accurate search results.

1. Navigate to Home > Search.

2. Enter one or more of the following search arguments in the available fields:

   - **ID** – Enter an integer to search for resources based on the internal ID or the legacy ID of a folder or document.

   - **All of the words** – Enter one or more words to search for resources that include all of the specified keywords.

   - **The exact phrase** – Enter a phrase to search for resources that include an exact phrase.

   - **At least one of the words** – Enter one or more words to search for resources that include any combination of the specified keywords.

   - **Without the words** – Enter one or more words to search for resources that do not contain any of the specified keywords.

3. If needed, select one or more of the following options from the drop-down menus:

   - **Within Section** – Search only within a specific section.

   - **Only Include File Type** – Select a file type to return only matching file types in your search results.

   - **Added or Modified** – Select a time interval to search for resources added or modified in the specified time frame.

   - **Votes** – Select a voting interval to search for resources based on a minimum number of votes.

   - **Display** – Specify the number of resources to display on each page of the search results.

4. Submit the search.

5. PowerSource locates resources matching all of the specified search criteria.

6. The Search Results page appears.

7. Sort the search results by ID, Title, Votes, Section, Type, or Published date.

8. To access a resource, select the resource title.

Save Search

After performing a search, either using the basic Search Site function or the Advanced Search function, use the Save Search function to save the search criteria.
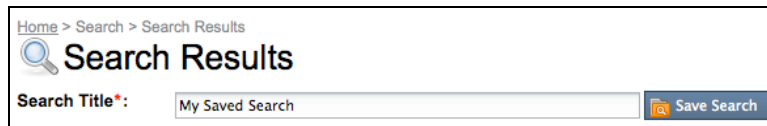

1. From the Search Results page, enter a title for the saved search in the Search Title text box.

2. Select the Save Search button.

3. To view or run a saved search, navigate to Home > My Saved Searches.

Browsing

To access a resource within a specific section of PowerSource, use the option to browse the folder structure.

1. Select tab to view a specific section.

   | Home | PowerSchool | SASI | Inform |
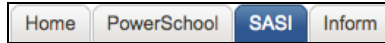
   Note: The available product sections will vary depending on the products purchased by your district or organization.

2. If you have selected one of the product-specific sections, you can choose to browse through the selected product's Knowledgebase folder, Documentation folder, or Downloads folder.

   | Home | PowerSchool | SASI | Inform |
   | Knowledgebase | Documentation | Downloads |
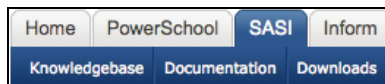
3. Continue browsing the selected section by expanding folders within the left sidebar folder navigation, or by clicking the resources in the Available Resources section (if available) at the bottom of the page.

Folder Navigation
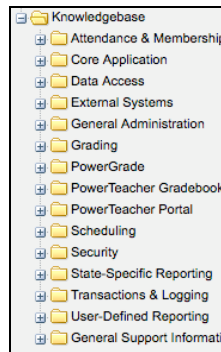
Available Resources

Resource Functions

When viewing a resource on PowerSource, there are several interactive functions available for each resource. To locate the options, scroll down to the bottom of the page, where you will see a horizontal bar containing several buttons.
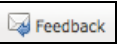
Comment

Use the [Comment] button to add a public comment to a resource.

1. Select the Comment button. A comment box appears at the bottom of the page.

2. Enter your comments in the Add Your Comment field.

3. Click the Submit button to save the comment. Other users can now view, vote, or reply to your comment.

4. To reply to a comment, click on the Reply button and follow steps 2 – 3 above.

5. To vote on a comment, click on either the minus (-) or plus (+) sign. You may vote only once for each comment.

Feedback

Use the [Feedback] button to submit feedback about a resource to the site administrator.
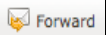
1. Select the Feedback button. The Feedback page appears.

2. Populate the fields in the Feedback form.

3. Click the Submit button to save the feedback. The feedback information is sent to the site administrator for review.

More Info

Use the [More Info] button to view details about a resource.

1. Select the More Info button. The More Information pop-up window displays on the screen.

2. Review the additional information, such as ID, Type, Created By, Created On, etc.

3. To collapse the window, select the minus (-) button in the upper right corner.

4. Click the Close button to close the More Information window.

Forward

Use the [Forward] button to email a link to the resource to a recipient.

1. Select the Forward button. The Forward screen appears.

2. Enter your name, email address, the email address of the recipient and a comment.

3. Submit the page to email a link to the resource, along with your comment, to the recipient.
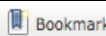
Bookmark

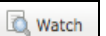Use the [Bookmark] button to add a resource to the My Bookmarks section for quick reference.

1. Select the Bookmark button. The button label changes from Bookmark to Bookmarked.

2. Navigate to Home > My Bookmarks to view the bookmark.

Subscribe

Use the [Subscribe] button to subscribe to PowerSource content using an RSS reader.

1. Select the Subscribe button. The Subscribe page appears.

2. Select the application you would like to use to subscribe to the web feed.

3. Select the Subscribe Now button to save the settings.

4. Enter a name for the web feed and confirm your selection.

Watch

Use the [Watch] button to be contacted via email when a resource is updated.

1. Select the Watch button. The button label changes from Watch to Watching.

2. Navigate to Home > My Watches to view or delete the Watch.

Vote

Use the [+1 vote − +] buttons to increase or decrease the vote count for a resource.

1. Select either the minus (-) or plus (+) sign under the vote count at the upper right hand corner of the page to add or subtract votes from a folder or document.

2. The vote count changes based on your selection. You can vote once for each resource.

The PowerSource Community

The Community section includes the community-focused features of PowerSource such as the Download Center.

Download Center

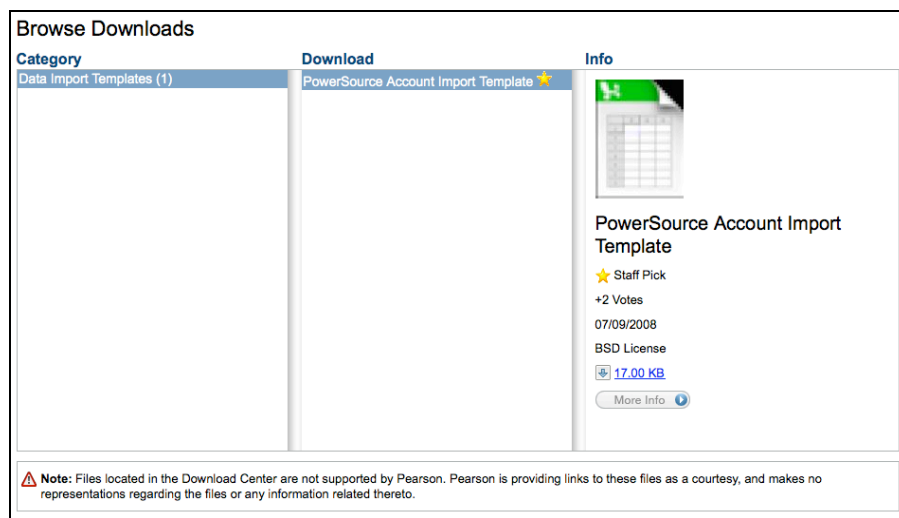Use the Download Center to access content created and contributed by the PowerSource community such as custom reports or web pages. Users can download and provide feedback on existing resources, or submit new resources for the rest of the community.

Browse the Download Center

User-submitted resources can be accessed in the Download Center.

1. Navigate to Community > Download Center. The Download Center page appears.

2. Click the Browse Downloads tab.

3. Select a category in the Category column. The available downloads appear in the Download column.

4. Select a download from the Download column. Basic information about the selected download appears in the Info column.

5. Click More Info in the Info column to view detailed information about the selected download.

6. While viewing the detailed information page for a download, you can provide feedback or download the selected resource.

Provide Feedback

When viewing the detailed information for a resource in the Download Center, you can submit feedback on the selected resource.

1. Click the [🔶 Flag this Download] link to mark a specific resource as potentially malicious. When flagging a resource, you are notifying other users in the community that a specific download may be harmful or may not function as expected.

2. Click the minus (-) or plus (+) symbol to vote a resource up or down.

3. Add comments about a resource in the Comments field at the bottom of the page.

Submit New Resources

1. Navigate to Community > Download Center.

2. Click the Add a File tab. The Add a File page appears.

3. Populate the following fields:

   - **Title** (Required) – Enter the title of the new file.
   - **Keywords** – Enter any keywords associated with the file.
   - **Download File** (Required) – Select the file to upload to PowerSource.
   - **Category** (Required) – Select a category.
   - **Description** (Required) – Enter a description of the new file.
   - **Installation** – Enter the installation instructions if applicable.
   - **Instructions** – Enter any additional instructions if applicable.
   - **Version** – Enter a version if applicable.
   - **System Requirements** – Enter the system requirements if applicable.
   - **License Agreement** (Required) – Select a license agreement if applicable.
   - **Support Level** (Required) – Specify the level of support provided by the content author.
   - **Screen Shot** – Upload a screenshot of the new file.

4. Click Submit.

My Downloads

Use the My Downloads page to view the files you have submitted to the Download Center.

1. Navigate to Community > Download Center.

2. Click the My Downloads tab.

3. View the files you have submitted to the Downloads Center.

Account Management

If you are a registered Technical Contact at your school district or organization, you can manage your site's user accounts. Access the Account Management functions at Home > Account Management.

Account Management	Manage Technical Contacts	Account Settings	Add User	Import Users

Manage Existing Users

Use the Account Management functions to manage your site's existing user accounts.

1. Navigate to Home > Account Management. The Account Management page appears and the Account Management tab is active.

2. Click Edit to access the Update a User page and modify a user's profile.

3. Click Reset to reset a user's password. The user's password will be send to the email address assigned to the user account.

Email:	Last Name:	First Name:	Phone:	Title:	Edit:	Password:
					Edit	Reset
Result Page: 1						Results: 1 - 1 of 1

Manage Technical Contacts

Use the Manage Technical Contacts page to manage the users who are registered Technical Contacts. The number of Technical Contacts specified cannot exceed the number of Technical Contacts authorized by your district.

1. Navigate to Home > Account Management.

2. Select the Manage Technical Contacts tab.

3. Click Remove to remove a user from the list of designated technical contacts or implementation contacts.

4. To add a new Technical Contact or Implementation Contact, select a user's name from the User menu, then click Designate as a Technical/Implementation Contact.

Note: If the Designate Contacts area does not appear, that indicates your district is using the maximum number of technical and implementation contacts. Either remove an existing technical or implementation contact, or contact Pearson to request additional contacts for your district.

Account Settings

Use the Account Settings page to set default account permissions and activate your site's account creation URL. Teachers, staff, or other individuals in your district may access the account creation URL to register for a PowerSource account.

1. Navigate to Home > Account Management.

2. Click the Account Settings tab.

3. Determine whether or not a new user can create additional users by default.

4. Determine whether or not a new user can enroll in Learning Management System courses by default.

5. Determine whether or not a new user can enroll in Training by default.

6. Determine whether or not a new user can update existing users by default.

7. Determine whether or not a new user can upload files to the Download Center by default.

8. Determine whether or not a new user can use your site's POs to purchase training.

9. Determine whether or not your site's Technical Contacts should be notified when a new user is created for your site.

10. Enable or disable your site's account creation URL. Teachers, staff, or other members of your organization can visit this URL to register for a PowerSource account.

11. Enter at least one valid email domain for your site. Whether creating users manually, by importing, or by allowing user's access to the account creation URL, new users must have an email address at the specified valid email domains for your district. For example, if you specify mydistrict.k12.us, only users with email addresses at that email domain may register for an account on PowerSource.

12. Click Save to save your changes.

Add User

Permissions
- ☐ Can create users.
- ☑ Can enroll in the Learning Management System.
- ☑ Can enroll in Training.
- ☐ Can update users.
- ☑ Can upload files in the download center.
- ☐ Can use POs with an available balance for training.

☑ Notify Tech Contacts on User Creation.
☐ Enable special user creation URL.

Valid Email Domains*:

Your Site's URL for users to sign up is at http_____signup/___

If you have the "Enable special user creation URL" setting checked you will need to specify available domains. Please enter a comma separated list of domain names that are valid for your district. For example: **msn.com, yahoo.com, gmail.com**.

Save

Note: If your district or organization does not use a specific domain name for teacher or staff email accounts, Pearson recommends disabling your site's account creation URL. Instead, import users using the Import Users function.

Add Users

Use the Add User page to create an individual user account for your site.

1. Navigate to Home > Account Management.

2. Click the Add User tab.

3. Populate the required fields for the new user's profile.

4. Specify the site permissions for the new user.

5. Click Save to finish creating the new user's account. The new user will receive an email confirming site registration.

Import Users

Use the Import Users page to create multiple user accounts using an Excel import file.

1. Navigate to Home > Account Management.

2. Click the Import Users tab.

3. Click Browse to select an Import File.

4. Click Import to begin the import process.

The following fields are required for your import file: Email, First Name, Last Name, and Role. For additional information on importing users, please refer to the PowerSource online help.

Permissions

The following table describes the permissions that can be set for each user account within your site.

Permission	Description
Can create users.	User can use the Add User and Import Users account management functions to create users.
Can enroll in the Learning Management System.	User can enroll in online training classes.
Can enroll in training.	User can enroll in other training classes.
Can update users.	User can update users using the Account Management functions.
Can upload files in the download center.	User can upload files to the Download Center to share with other members of the PowerSource community.
Can use POs with an available balance for training.	User is allowed to purchase training using any valid purchase orders for your site.

Password Recovery

PowerSource provides simple and secure password recovery functionality. Follow the instructions below to rest your PowerSource password.

1. On the PowerSource login screen, click Forgot Your Password.

2. Enter your email address in the Username field.

3. Submit the page.

4. If prompted, answer your security question.

5. Check your email and note your new PowerSource password.

Note: If you do not know the answer to your security question, please contact one of your site's Technical Contacts to reset your password using the Account Management feature.