

# PowerPTC

## Administrative User Guide

(Last Updated: September 2018)

Covers Version 1.7.7+

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## Overview

**PowerPTC** is a Parent-Teacher conference scheduling solution designed to allow parents, at their convenience, to create appointments with their student's teachers. **PowerPTC** also attempts to give parents complete control of scheduling by allowing them to choose what day to attend conferences (if conferences are setup to span multiple days) as well as choose a starting time within that day to attend conferences. **PowerPTC** will attempt to automatically build the best schedule based on this criteria. The scheduler will attempt to keep the parent's total schedule duration as short as possible as well as keep their travel within your buildings and between floors to a minimum.

There are two modes in which parents are able to schedule their conferences, automatic and manual. Automatic mode (default) asks the user to select a conference date and starting time. With this information, the scheduling engine will attempt to create the best schedule possible. The scheduler can also pad appointments to allow guardians to travel between appointments. Automatic scheduling can make intelligent choices as to what the best schedule for a parent is. It will take into account travel between floors, time spent, etc. Manual scheduling allows parents to schedule each of their student's courses one at a time. Manual scheduling may be preferred for organizations that have only a few meeting appointments to schedule, this may include grade schools.

**PowerPTC** will work with nearly any Student Information System. Student data from your SIS system is uploaded to **PowerPTC** via five CSV files that hold course, student, and teacher information.

Parent-Teacher conferences schedules in **PowerPTC** are generated based on a student's course schedule from the district's student information system. This means that **PowerPTC** can only schedule appointments with instructors of courses that are part of the student's schedule, unless **Open Scheduling** is enabled on the Meeting Place item.

**PowerPTC** requires that a master schedule is created prior to opening scheduling for parents. The master schedule in **PowerPTC** will combine date information and meeting places to generate a schedule that parents can then schedule into. Once a master schedule has been created and parents have started scheduling into it, very few modifications can be made to the schedule without adversely affecting existing parent's schedules. It is very important that date information, as well as meeting place, information be entered correctly prior to opening scheduling to the public.

**PowerPTC** will gracefully handle parents that have multiple students enrolled in the district. If the students are all activated under a single account, then **PowerPTC** will ensure that appointments do not overlap. When the parent generates a print version of

their schedule, it will combine their appointments into a single report. **PowerPTC** can also handle multiple parents that need to schedule separate appointments for a single student.

## **Browser Support & Operating System Support**

**PowerPTC** supports Windows, Mac OSX, Linux, Chrome OS, iOS, & Android with the most recent version of either Mozilla Firefox, Google Chrome, or Microsoft Internet Explorer.

The **Student Exporter** tool will run on Mac OS, Windows 7 or later.

## **Web Address**

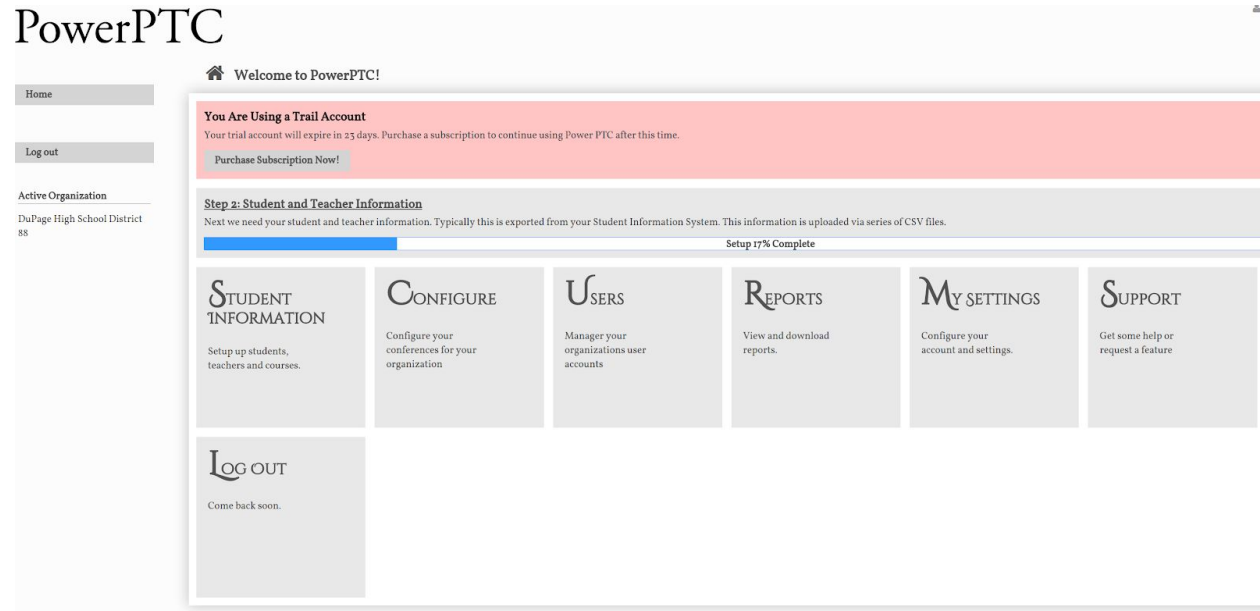
<https://www.powerptc.net>

# Basic Concepts

Before you get started with **PowerPTC**, there are a few basic concepts that you will want to know. Below we will briefly cover the major sections of the administrative interface.

## Admin Sections

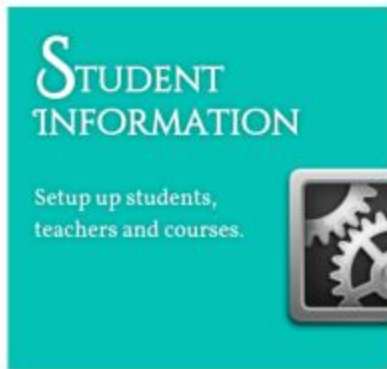
### Home Screen



The home screen is the screen that you will see after you log into **PowerPTC** with an administrative account. The home screen provides links to the other sections of **PowerPTC**. This screen will also guide you through a basic setup wizard to get Parent-Teacher Conferences configured. This screen will also alert you when your subscription is about to expire and give general site news and information including scheduled outages, etc. You can get back to the home screen at anytime by clicking on the **Home** menu button in the upper left-hand corner.



## Student Information



This section allows you to upload your student information into **PowerPTC**. In general, you would upload five CSV files to **PowerPTC**. This information includes:

1. Courses
2. Students
3. Teachers
4. Student Enrollments
5. Teacher Enrollments

These five files allow us to support courses with multiple or co-taught teachers. **PowerPTC** provides a tool in the **Documents & Files** section which allows you to easily export your student information into the required files.

## Configure Section



This section contains most other setting for your Parent-Teacher Conferences. This includes the buildings where you will host conferences, dates for your conferences, the meeting places for your teachers (what rooms your teachers will use to meet with Parents), etc.

## Users Section



The Users section allows you to manage your:

- Parent/Guardian Accounts
- Teacher Accounts
- Admin Accounts
- Parent Activation Codes (Used to create parent accounts)
- Teacher Activation Codes (Used to create teacher accounts)

This section also allows administrative users to impersonate parents accounts for troubleshooting purposes.

## Reports & Graphs Section



The Reports & Graphs section allows for the visualization and the download of conference information in PDF and CSV/Excel formats. Select reports also allow for the direct email of information to certain target users.

## My Settings Section



The My Settings section allows for the configuration of settings specific to your account including your password, etc.

## Documents & Files



The Documents & Files sections gives you access to user documentation as well as other downloads including the Student Exporter.

## Support Section



The Support section allows for the creation of support tickets, access to documentation and files, as well as change log information.

# Conference Setup

In this section we will go through the process of setting up **PowerPTC** for your conferences. These steps should be followed in order as certain steps depend on a previous step.

## 1. Establish Locations

The first thing we need to do is to determine where parent-teacher conferences will be held. This is done by creating **Locations**. **Locations** are typically the geographic locations where parents will meet with teachers. Normally locations are simply the school buildings within your district.

1. To create a new **Location**, from the **Home Screen** click on **Configure**
2. **Now click on the “+” to add a new Location**
3. In the new Location dialog box, enter a **Location Number**

**Note: This field is very important as it must match the location/school number from your student information files. This value is used to tie the conference schedule to a student or teacher’s schedule. There is more information on this setting in the Student Information Section of this document.**

4. **Enter a short name for your location, for example if your high school’s name is *Example Town High School* we would recommend using something brief like ‘*ETHS*’.**
5. **Enter the full proper name of your location, in this case we would use *Example Town High School* as in our previous step.**
6. **You may also wish to enter an address and phone number for the location as well. This information may be helpful to parents.**

When defining a **Location**, it is possible to place a limit on the number of appointments a guardian may schedule for a given student. This setting is present on the **Advanced** tab of a **Location**. If you do not wish to limit the number of appointments a guardian may schedule, set this field to **-1**.

Repeat these steps for each location where parent-teacher conferences will be held.

## 2. Upload Student and Teacher Information

Next we need to upload student, teacher, and course information into **PowerPTC**. This information is used to determine with whom parents are able to schedule conferences with. This information typically comes from your organization's SIS system. We provide a tool to make the process of exporting this information easy called the **Student Exporter**. This tool can connect to various SIS systems and export the required information.



**Hint:** We have provided sample Student Information Data (Sample SIS Data) in the **Documents & Files** area of the **Support** section to allow for easy evaluation of **PowerPTC**. These files can be uploaded in the **Student Information** Section to allow for testing **PowerPTC** without exporting or uploading your District's student information.

The CSV files may include a header column, but it is recommended that the header values are prefixed with two \* (asterisk) characters. For example, "\*\*\*Student Number\*\*" would be preferred over "Student Number" for a column header or title row. The double asterisk tells the **PowerPTC** import agent that the row should be ignored as a header column.

To upload this information, you need to create 5 CSV files with the following information (or use the **Student Exporter** tool):

### 1. **Courses File**

#### a. **SIS Unique ID**

Globally Unique ID number for your course section; typically a section database (ie: courseSection.ID) primary key.  
(Globally Unique, Number, Required)

#### b. **Location Number**

Must match the Location Number of a Location you created in the previous step.  
(Text, Required)

#### c. **Course Name/Title**

(Text, Required)

#### d. **Course Code**

(Text, Required)

#### e. **Course Section Number**

(Text, Required)

#### f. **Course Room Number**

(Text, Required)

- g. **Course Period**  
(Text, Optional)
- h. **Term**  
(Text, Optional)
- i. **Year**  
(Text, Optional)

## 2. **Students File**

- a. **Student Number**  
The student's identifier in your student information system; often called the student number or student id.  
(Globally Unique, Text, Required)
- b. **First Name**  
The student's first name  
(Text, Required)
- c. **Last Name**  
The student's last name  
(Text, Required)
- d. **Location Number**  
Must match the Location Number of a Location you created in the previous step.  
(Text, Required)
- e. **Parent Email Address**  
This is an optional field that is used to email parents their activation codes. Multiple email addresses should be separated by a comma. (As of version 1.0.0)  
(Text, Optional)

## 3. **Teachers File**

- a. **Teacher Number**  
The teacher identifier in your student information system; often called the teacher number or teacher id.  
(Globally Unique, Number, Required)
- b. **First Name**  
The teacher's first name  
(Text, Required)
- c. **Last Name**  
The teacher's last name  
(Text, Required)
- d. **Email Address**  
The teacher's email address; This is used to send the teacher their account activation code.  
(Text, Optional)

**e. PTC Room Number**

This optional field is the Parent-Teacher Conference room number (which may be different from the room where the teacher normally teaches). This is the location where the teacher will host their Parent-Teacher Conferences.

(Text, Optional)

**f. Meeting Length Multiplier**

This option field is the Meeting Length Multiplier you would like to use with this given teacher when they are import via the “Add for All Teachers” function in the Meeting Place section.

(Number, Optional)

**g. Open Scheduling**

This field can be either “1” (Open Scheduling enabled) or “0” (Open Scheduling disabled; default). This value is only applied when the “Add for All Teachers” function is used in the Meeting Place section.

(Number, Optional)

**h. Open Scheduling Description**

This field is used to populate the Open Scheduling Description field in the Meeting Place section when the “Add for All Teachers” function is used.

(Text, Optional)

**i. PTC Floor**

The floor field is used in association with the PTC Room number to define on a Meeting Place the floor used for geographic optimizations.

(Number, Optional)

**j. PTC Sector**

The sector field is used in association with the PTC Room number to define on a Meeting Place the sector, or sub division of a floor, used for geographic optimizations.

(Number, Optional)

**4. Student Enrollments File**

**a. Student Number**

This must match the student number from the Students file

(Text, Required)

**b. Course SIS Unique ID**

This must match the SIS Unique ID from the Courses file

(Number, Required)

**c. Grade**

The student’s current letter grade in progress for this enrollment

(Text, Optional)

**d. Grade Percent**

The student’s current grade as a percentage. This will be rounded to an

integer.  
(Number, Optional)

**e. Absences**

The current number of absences the student has for this enrollment.  
(Number, Optional)

**f. Comments**

Any other comment or message you would like to display to the guardian.  
(Text, Optional)

**5. Teacher Enrollments**

**a. Teacher Number**

This must match the teacher number from the Teachers file  
(Number, Required)

**b. Course SIS Unique ID**

This must match the SIS Unique ID from the Courses file  
(Number, Required)

**c. Is Co-Teacher/Non-Primary Teacher**

This field can either be blank or “0” (meaning the teacher is a primary teacher) or “1” (meaning the teacher is a non-primary or co-teacher).  
(Number, Optional)

## Handling Co-Teachers

There are two methods for handling scheduling with courses where there are multiple teachers associated with a section.

### All Primary Method

The first method, **All Primary**, which is also the default method for legacy reasons, treats all teachers as primary teachers. In the **All Primary** method all teachers will be available for parents to schedule individual, separate conference appointments. In the **All Primary** method, the guardian will not meet with all the teachers at one conference appointment.

### Co-Teacher Scheduling Method

The second method, **Co-Teacher Scheduling**, will schedule a single appointment for a parent and attempt to include all co-teachers in the same meeting slot, where possible. When using this method you should upload only a single primary teacher for a section, then as many co-teachers as you like. When the parent schedules for the course, they will only see the primary teacher listed, but when an appointment is scheduled, the scheduler will attempt to schedule as many of the co-teachers at the time selected for



the primary teacher as possible. In the **Co-Teacher Scheduling** method, the appointment location will take place in the room where the primary teacher is located for conferences.



**Hint:** When using the **Co-Teacher Scheduling** method it is important to ensure that you have one and only-one primary teacher for each section. If you don't have a primary teacher, parent's will not be able to schedule for the course at all. If you have multiple primary teachers for a course, parents will be able to schedule with each of them and all co-teachers will be included for each primary teacher scheduled.

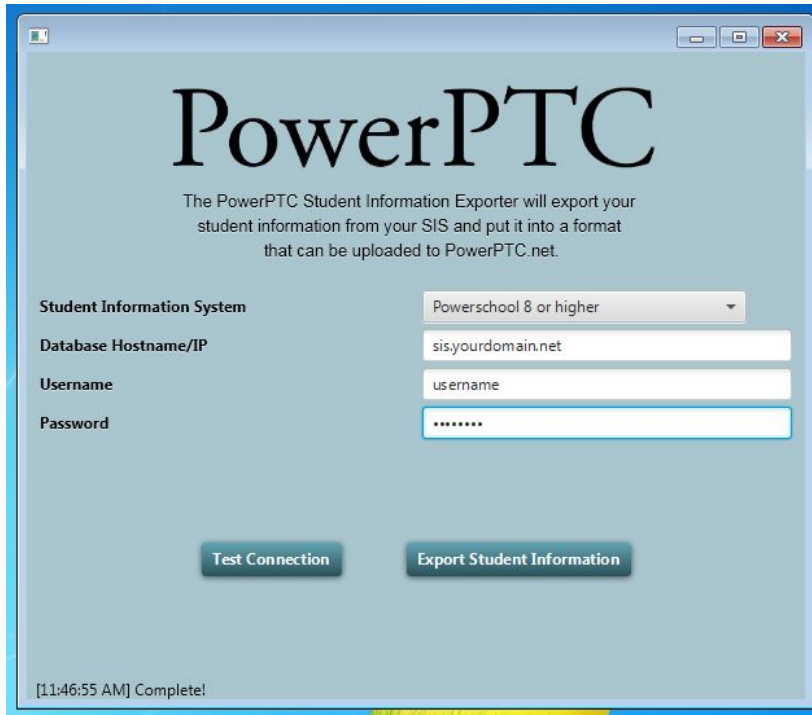
### Selecting the Appropriate Method

You can determine the mode you are currently using by navigating to:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Other Settings**.
3. Check the box next to **Enable Co-teacher Scheduling (Requires SIS Re-import)** to enable the **Co-Teacher Scheduling Method**, uncheck the associated checkbox to use the **All Primary Method**.
4. After selecting a method, you will need to re-upload you SIS data for the changes to take effect. You will need to ensure that if you select the **Co-Teacher Schedule Method** that you indicate which teachers are co-teachers (non-primary) in your Teacher Enrollments file. When the **All Primary** method is selected, the co-teacher field in the Teacher Enrollments file is ignored.

## The Student Exporter Tool

The **Student Exporter** is a tool that will make the process of exporting your student information easier.



The screenshot shows a web-based application window titled "PowerPTC". The main heading is "PowerPTC" in a large, serif font. Below it, a subtitle reads: "The PowerPTC Student Information Exporter will export your student information from your SIS and put it into a format that can be uploaded to PowerPTC.net." The interface includes several input fields: a dropdown menu for "Student Information System" (set to "Powerschool 8 or higher"), a text box for "Database Hostname/IP" (containing "sis.yourdomain.net"), a text box for "Username" (containing "username"), and a password field for "Password" (masked with "\*\*\*\*\*"). At the bottom, there are two buttons: "Test Connection" and "Export Student Information". A status bar at the bottom left shows "[11:46:55 AM] Complete!".

This tool can be downloaded and run by performing the following:

### Windows 7 or later

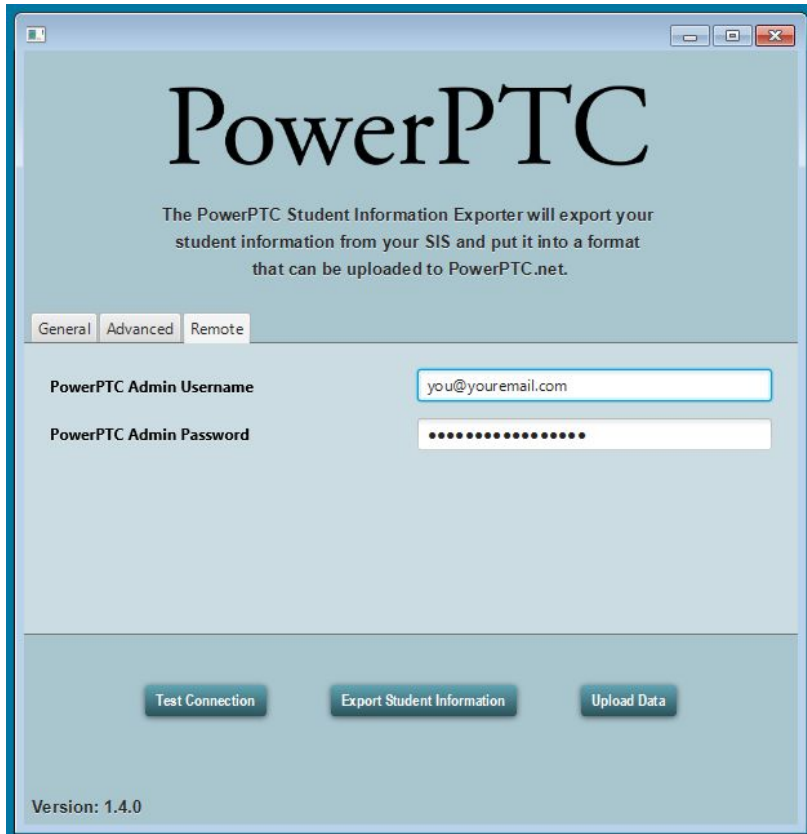
1. Log into PowerPTC.net
2. Go to the **Support** section
3. Click on **Documents & Files** from the left-hand menu
4. Click on **PowerPTC - Student Exporter** to download the application
5. Unzip the downloaded folder
6. Double-click on **PowerPTCStudentExporter.exe**
7. Select your **Student Information System**
8. Enter the **IP address** or hostname for the host running the database for your Student Information System
9. Enter the database **username** and **password**
10. Click on **Test Connection**
11. If the connection is successful, then click on **Export Student Information**

## Mac OS

1. Download and install the latest version of the Java runtime from <http://www.java.com>
2. Log into PowerPTC.net
3. Go to the **Support** section
4. Click on **Documents & Files** from the left-hand menu
5. Click on **PowerPTC - Student Exporter** to download the application
6. Unzip the downloaded file
7. Navigate to the **app** directory within the extracted folder
8. Right-click or control+click on the **PowerPTCStudentExporter.jar** file
9. Select **Open with -> Jar Launcher** to start the application
10. Select your **Student Information System**
11. Enter the **IP address** or hostname for the host running the database for your Student Information System
12. Enter the database **username** and **password**
13. Click on **Test Connection**
14. If the connection is successful, then click on **Export Student Information**

Once complete, your data files will be located in **[unzipped folder]/PowerPTCStudentExporter/app/export/** or in the location reported in the status bar after export has completed. The files located in this directory will need to be uploaded to PowerPTC.net.

Starting with version 1.4.0 of the Student Exporter tool, it is possible to directly upload your SIS data to **PowerPTC**. If you enter a valid PowerPTC.net administrative username and password in the **Remote** tab, you can upload your data by clicking the **Upload Data** button after you have exported your student information. This will send your data to PowerPTC.net to be processed and imported. You can view the progress of the import as well as the results within the **PowerPTC** web interface. When importing SIS data using this method, your previous SIS data will be deleted prior to importing the new information.



The PowerPTC Student Exporter exposes a few command line arguments to make it easier to automate the sending of your student information.

- x, --export** This command line argument will automatically export your student information locally, then exit the application.
- u, --upload** This command line argument will automatically export your student information locally, attempt to upload it to PowerPTC.net, then exit the application.

Prior to uploading data to **PowerPTC**, the 5 or more csv files are zipped and a new file is created named **upload.zip** in the export directory. This is the file which is uploaded to **PowerPTC**, not the individual CSV files. This is important to note if you wish to make modifications to the files prior to uploading them to **PowerPTC**.

Naming of the files within the zip file is also important. The PowerPTC import agent will look at the contents of the zip file and determine the type of file being imported by using the first character of the file's name. The first character is expected to be a number and will be imported using the following mapping:

First character of the Filename	File Type
1	Courses File
2	Students File
3	Teachers File
4	Student Enrollments File
5	Teacher Enrollments File
All Others	Ignored

**PowerSchool Only:** SAML guardian email addresses are not be processed when uploaded from the Student exporter client. This file must still be manually uploaded.

Your login information and SIS data is transmitted to PowerPTC.net using HTTPS to help keep your data private.

If you would like to view or modify the queries being executed against your database, you may do so by modifying **[unzipped folder]/PowerPTCStudentExporter/app/datasources.properties**.

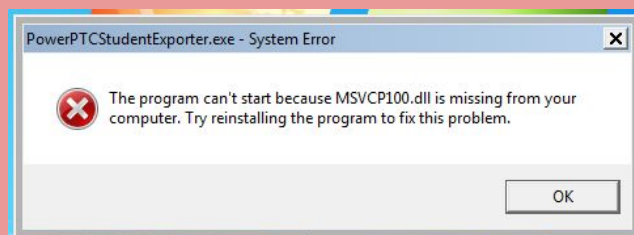


**Hint:** If your Student Information System isn't included in this tool, please open a support ticket.



If you get an MSVCP100.dll error when attempting to run **PowerPTCStudentExporter.exe**. You will need to install **Microsoft Visual C++ Redistributable Package** from:

<http://www.microsoft.com/en-us/download/details.aspx?id=5555>





## Manually Uploading your Student Information

The five files previously discussed can be uploaded by clicking on **Student Information** from the **Home Screen**. The files must be uploaded one at a time in the following order:

1. Courses
2. Students
3. Teachers
4. Student Enrollments
5. Teacher Enrollments

If you encounter errors while uploading course information, ensure that you have created a Location that matches the location number from the courses file. SIS information will only be uploaded for course information with a location number that matches that of a Location defined in **PowerPTC**.

Student information can be deleted and uploaded at any point, however it is highly recommended that this information isn't modified while parents are scheduling their conferences.



**Hint:** Upload a fresh copy of your student information a day or two prior to opening scheduling to parents. This will ensure that your grades, absences, etc are as current as possible.

## Updating Your Student Information

For districts with larger enrollments, it may be difficult to delete and re-import all student information. With **PowerPTC**, you have the option to upload and append new teachers, students, and enrollments. The option to **Append** more student information is available after the initial student import has been completed. When appending additional student information, the order of file uploads is still important and must be obeyed. You should upload your additional student information in the order listed in the previous section.

To upload additional CSV files:

1. Click on **Student Information** from the **Home Screen**.
2. Select the file you would like to upload and click on the corresponding **(Details)**
3. link. In the details dialog, click on the **Append** link to upload your file.

It is also possible to modify your student data directly on **PowerPTC**. For example, you can add/remove students, enroll students, etc. This is available within the Student Information section of PowerPTC. It isn't recommended to make many changes using this method, instead we recommend following a unidirectional, reproducible data pipeline coming from your SIS system.

## **Student Data Protection Best Practices**

### Removing Unused Student Data

The **PowerPTC** team is very security focused and we take many steps and follow best practices to ensure that your data is safe. Your organization will likely have many accounts which will have access to student information including parents accounts, teacher accounts, and admin accounts. If any of these accounts are breached for any reason, it is possible for your student information to be leaked. The best way to ensure that your data doesn't get compromised is to remove it when it is not being used. It is highly recommended that after your Parent-Teacher conferences have taken place and you have exported all data you would like to save from your conferences, that you delete the student information which is stored on **PowerPTC**. Removing your district's student information is a step we recommend to ensure your student data stays private. To remove your student information, perform the following steps:

1. Click on **Student Information** from the **Home Screen**.
2. From the left-hand menu, click on **Clear SIS Info**.
3. Click on **Delete All Course Information, Delete All Student Information** and **Delete All Teacher Information**.

### Masking Uploaded Information

We recommend masking certain student fields from your student information system to ensure student data is safe. Fields like the student's last name can be masked to protect student information. For example, instead of uploading the student's real last name, ie: "Smith", instead upload a masked portion of the last name like "S..."

The Student Exporter tool allows you to easily mask the student last name by selecting **Mask Student Last Name** to help protect student information (pictured below). The limitation of masking the student's last name is that you will not be able to search by the student's last name in PowerPTC, so you will need to search by their student ID or number.



PowerPTC

The PowerPTC Student Information Exporter will export your student information from your SIS and put it into a format that can be uploaded to PowerPTC.net.

General Advanced

**Mask Student Last Name**

**Export Courses as of Date**

**Output Directory**  
C:\Users\devpc\Downloads

**Log Directory**  
Show Logs

**Test Connection** **Export Student Information**

Version: 1.3.1

### 3. Configure Conference Days

**Days** in **PowerPTC** define when conferences will take place and when parents are able to schedule. **Days** are defined for each location, so you may have multiple locations that hold conferences on different days. Conferences may also be held over multiple days at a given location by creating multiple Day items in **PowerPTC**.

To add a new **Day**:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Days**.
3. Now click on the “+” to add a new **Day**.
4. Enter a **Conference Start Date** and **Conference End Date**. This represents the actual date and times of your parent-teacher conferences.
5. Enter a **Scheduling Open Time** and **Scheduling Close Time**. This represents the time frame when parents are able to schedule appointments.
6. Enter a **Meeting Length** or the length of each appointment with a parent.
7. Select which **location** this day is to be associated with and click the **Add** button
8. Determine if you would like to **Pad** or set **Travel Time** for your appointments. See the section below titled “*Padding Appointments vs Travel Time*” for more information.

#### Padding Appointments vs Travel Time

Typically during Parent-Teacher conferences your organization will want to allow travel time between appointments for parents. In **PowerPTC** there are two methods to allow for travel between appointments, **Padding Appointments** and **Travel Time**. Only one of these two methods can be used at a time.

##### Padding Appointments

The **Padding Appointments** setting tells the scheduling engine to add an empty appointment between any two appointments that a parent schedules. This allows travel time for the parent between appointments. This is typically only recommended when meeting lengths are short (ie: less than 10 minutes) and when the meeting length and the padded time between appointments desired are the same (ie: 5 minutes appointments with 5 minutes of time between appointments for travel). The benefit of this method is that other appointments can take place during travel time.

When using appointment padding, you have the option to allow parent and guardians the ability to select the amount of padding between appointments, between 1 and 3

appointment lengths. This option can be enabled per Day, by selecting the option **User Defined Padding**.

### Travel Time

The Travel Time setting is block of time set aside at the end of all appointments for travel. This setting is preferred for longer appointments or in situations where the appointment length and the travel time length are not the same. The downside of this method is that teachers are unable to have appointments during the travel time, whereas with Padded Appointments, teachers are able to meet with Parents during while other parents are traveling. Ultimately if you are unsure what method to use, select Travel Time.

Travel Time becomes slightly more complicated when considering the **Meeting Length Multiplier**. Travel Time is added to the appointment prior to the **Meeting Length Multiplier**. For example, if a Day is defines to have a Meeting Length of 5 minutes with a travel time of 1 minute, you would have an appointment block length of 6 minutes. When the Meeting Length Multiplier of 2x is applied, this would result in appointment blocks of 12 ( $6 \times 2$ ) not 11 ( $(5 \times 2) + 1$ ). Additionally, a 3x Meeting Length Multiplier would result in a 18 ( $6 \times 3$ ) minute block, not 16 ( $(5 \times 3) + 1$ ) minutes.



**Warning:** After your **Days** have been created, be cautious when changing your conference times. If you modify your conference times it may affect breaks that have been set on your **Meeting Places**.

## 4. (Optional) Configure Break Blocks

Before we discuss **Break Blocks**, we just first describe the concept of **Breaks** in **PowerPTC**. **Breaks** are reserved teacher appointment slots and which do not allow for guardian scheduling. **Breaks** are often used to allow for catch up time for teachers or in groups they can used for lunch or dinner breaks. **Breaks** can be defined on **Meeting Places** in two ways, the first being in **Break Requests**, which are defined prior to your master schedule being created. They are applied to the master schedule when the schedule is create. The second type of **Breaks** (or **Live Breaks**) are applied directly to the master schedule from the **Live Schedule** tab of a **Meeting Place**. The later type is used to block off appointments after the Master Schedule is create and guardians may be actively scheduling.

**Break Blocks** in **PowerPTC** are spans of time, defined per location, which can be reserved as breaks for your staff members. **Break Blocks** are typically used to reserve lunch or dinner breaks for your staff members. One feature of **Break Blocks** is that you can define multiple blocks per building and they can be randomly assigned to your **Meeting Places**. Multiple **Break Blocks** times are recommended to ensure that there is not a single period of time in your schedule where parents are unable to schedule due to all teachers being on a dinner or lunch break.

**Break Blocks** only apply to break requests and must be configured and applied to **Meeting Places** prior to building the **Master Schedule**. **Break Blocks** are applied to Meeting Places when they are mass generated or can be applied after creation from the **Meeting Places** section by selecting **Apply Breaks**. More information on applying **Break Blocks** in the next section on **Meeting Places**.

To add a new **Break Block** perform the following:

5. Click on **Configure** from the **Home Screen**.
6. From the left-hand menu, click on **Break Blocks**.
7. Click on the “+” to add a new **Break Block**.
8. Enter a start and end time for the break
9. Select a location that the break time applies to
10. Click **Add** to save your **Break Block**.

## 5. Set Up Meeting Places

**Meeting Places** in **PowerPTC** define a teacher in a specific location during Parent-Teacher conferences. A **Meeting Places** consists of room information, teacher information, and a location. You will need to create a **Meeting Places** for every teacher that would like parents to be able to schedule appointments with. **Meeting Places** are also responsible for managing teacher's breaks. A break is simply an appointment slot that is reserved for the teacher where parents are not able to schedule into. Breaks can be used for lunch or dinner breaks for teachers, or simply as padding to allow teachers to catch up in the event that an appointment has run long. Another important element of **Meeting Places** is that they are used to optimize a parent's schedule. There are two properties of resources that are used to give parents the best schedule possible, and those are **Floor** and **Sector**.

### Floor

The Floor value is used to ensure that parent's travel the minimum distance between their appointments. The floor value should be a number that identifies the floor on which the appointment is on. The **PowerPTC** scheduler attempts to create a schedule for a parent where two consecutive appointments are on the same floor, when possible.

### Sector

The Sector value is very similar to the floor property, in that it attempts to minimize a parent's travel between appointments. In **PowerPTC**, a sector is a subdivision of a floor and the **PowerPTC** scheduler will attempt to keep the parent in the same sector and floor for consecutive appointments, if possible. This setting helps in buildings that have very large floors to keep parent's travel to a minimum.

To add a new single **Meeting Place**:

1. Click on **Configure** from the **Home Screen**.
2. **From the left-hand menu, click on Meeting Places.**
3. Now click on the "+" to add a new single **Meeting Place**.
4. Enter a **Room** for the **Meeting Place**. This is where the parent-teacher conference will take place, which may not be the same as where the course meets.
5. Optionally, you can enter a **Room Description**. This may be used to help the parent or guardian locate the room.
6. Enter a **Floor Number** for the **Meeting Place**.
7. **Optionally, you can enter a Floor Description.**
8. Enter a **Sector Number** for the **Meeting Place**.
9. Select a **Location** for the **Meeting Place**.
10. Select a **Teacher** who is assigned to this **Meeting Place**.

11. Lastly, select if you would like to **Randomize Breaks** for this **Meeting Place**.

**PowerPTC** has the ability to make the creation of **Meeting Places** easier by mass adding a **Meeting Place** for every teacher that has been uploaded from your SIS system.

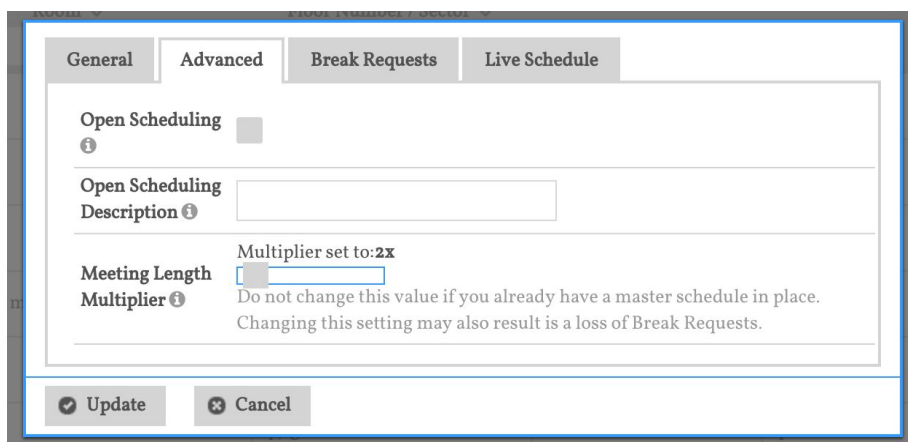
To mass add **Meeting Places** for every teacher:

1. Click on **Configure** from the **Home Screen**.
2. **From the left-hand menu, click on Meeting Places.**
3. Now click **Add For All Teachers**.
4. **Lastly, select if you would like to Randomize Breaks** and if you would like to **Apply Random Break Blocks** (if you have defined them).
5. Click **Add** to mass add the **Meeting Places**. This process might take a long time depending on the number of teachers present in your student information system.

After mass adding meeting places you will still likely need to modify them to update room assignments, floors, sectors, etc.

## Meeting Length Multiplier

The default meeting appointment length is defined when you configure your Days in PowerPTC, but there may be instances where you may prefer specific staff members to have longer appointment lengths. This is possible with a feature called **Meeting Length Multiplier**, you can configure this setting on the **Advanced** tab when modifying a Meeting Place.



The screenshot shows a configuration window for a Meeting Place. At the top, there are four tabs: General, Advanced, Break Requests, and Live Schedule. The 'Advanced' tab is selected. Below the tabs, there are several settings:

- Open Scheduling**: A checkbox that is currently unchecked.
- Open Scheduling Description**: A text input field.
- Meeting Length Multiplier**: A dropdown menu showing 'Multiplier set to: 2x'. Below this, there is a warning: 'Do not change this value if you already have a master schedule in place. Changing this setting may also result in a loss of Break Requests.'

At the bottom of the window, there are two buttons: 'Update' and 'Cancel'.

In the image above, the **Meeting Length Multiplier** is set to 2x, meaning that the appointment lengths for this Meeting Place will be 2 times the length of the default appointment configured in the **Day**.

To figure out the exact length of the meeting length when this option is used, we need to consider whether we are padding appointments or using travel time as well in our **Day** configuration.


If **Travel Time** is defined in the **Day** configuration, the calculation for the actual appointment length with the **Meeting Length Multiplier** is less intuitive. With **Travel Time** enabled, you must add the **Travel Time** to the **Meeting Length** in the **Day**, then multiply that number by your **Meeting Length Multiplier**. Finally, you would need to subtract one unit of **Travel Time** from that result. For example, if you had a Day configured with a Meeting Length of 5 minutes, Travel Time of 3 minutes, and a given Meeting Place had a Meeting Length Multiplier of 2x, then the actual appointment length for that staff member would be  $((5 + 3) * 2) - 3$  or 13 minutes with 3 minutes of travel time.

If the **Pad Schedules** option is selected in the Day configuration, the length of a staff members appointments will be the **Meeting Length Multiplier** times the **Meeting Length** value configured in the **Day**. For example, if you had a Day configured with a Meeting Length of 5 minutes, and the Meeting Length Multiplier was set to 3x, the actual meeting length per appointment would be 15 minutes.

## Open Scheduling

In **PowerPTC**, it is possible to have **Meeting Places** configured that do not require the guardian's student be scheduled with the teacher or staff member. When a resource is configured as an Open Scheduled resource, anyone parent or guardian will be able to schedule with them. This option is often used to allow parents to schedule conference appointments with counselors, deans, principals, or coaches. Since a parent may not know the role a person simply by their name, it is also possible to set a brief description with an open resource to give a parent or guardian context.

To make a **Meeting Place** an Open Scheduled Meeting Place, perform the following steps:

1. Click on **Configure** from the **Home Screen**.
2. **From the left-hand menu, click on Meeting Places.**
3. Select the **Meeting Place** on which you would like to enable **Open Scheduling** by clicking on the edit icon 
4. Click on the **Advanced** tab.
5. To enabled **Open Scheduling**, click on the checkbox next to **Open Scheduling** and enter a brief description for the **Meeting Place**.

## Managing Breaks

During your conferences you will likely want to assign breaks for your staff, either for getting caught up, allowing staff to stretch their legs, or for longer spans of times like lunch or diner.

Breaks in **PowerPTC** are very flexible, and as such, they can be confusing for new users. There are two tiers of break in **PowerPTC**, the first tier is called **Break Requests**, think of break requests as a holding or staging area for your breaks. The second tier of breaks are **Live Breaks**, Live Breaks are the breaks that exist on your Live Master Schedule.

### Managing Break Requests

**Break Requests** are breaks that are applied to the **Master Schedule** only when it is built. **Break Requests** that are added after the **Master Schedule** is created will not have any effect on the existing **Master Schedule**, they would only be applied to the **Master Schedule** on the next rebuild.

It is possible to modify **Break Requests** on the **Break Requests** tab of a **Meeting Place** by placing a check next to the time slot that you would like to have blocked off as a break when your **Master Schedule** is built.

If you allow teachers to request their own breaks from their teacher accounts, those requests are set at **Break Requests**.

### Managing Live Breaks on the Master Schedule

Once a **Master Schedule** has been created, breaks must be managed from the **Live Schedule** tab of a Meeting Place. Changes made here will take place immediately on the **Master Schedule**. Any changes made in the Live Schedule tab, to the **Live Breaks** will be lost if you need to rebuild your **Master Schedule**.

### Break Comments

Often times an administrator will need to block off an appointment for a teacher, but may need to add context.



Oct 2, 2015		Convert to Break
9:55 AM Oct 2, 2015	Break <a href="#">Add Comment</a>	Remove Break
10:00 AM Oct 2, 2015		Convert to Break
10:05 AM Oct 2, 2015		Convert to Break
10:10 AM Oct 2, 2015	Additional Information Here ✓ ✗	Remove Break
10:15 AM Oct 2, 2015		Convert to Break
10:20 AM Oct 2, 2015	Break <a href="#">Add Comment</a>	Remove Break
10:25 AM Oct 2, 2015		Convert to Break

Update Cancel

Additional information can be added to a break on the **Live Schedule** tab of a **Meeting Place** by clicking on the **Add Comment** link. This comment will be displayed on the Teacher's schedule online or via the printed version.

### Applying Breaks and Break Blocks to all Meeting Places

It order to make the process of setting up **Meeting Places** as easy as possible, you have the ability to randomly add breaks (single appointment) to a **Meeting Place** as well as randomly selecting a **Break Block** (multiple adjacent appointments) associated with a **Meeting Place's** location, and apply them. This can be done any time prior to building your **Master Schedule** in the Meeting Places section by selecting **Apply Breaks**. You are also given the option to clear all current breaks prior to applying breaks to your **Meeting Places**. When you apply breaks to your **Meeting Places**, these breaks will then be visible in the **Break Requests** section.

## 6. Ignored Courses

Often when you upload your student information there will be courses that you do not want parents to be able to schedule a conference for. Typically these include lunch periods, study halls, etc. **PowerPTC** offers a method to disable scheduling for these courses via **Ignored Courses**. An **Ignored Course** entry will match against the course's **Course Code** from your student information system. There are two types of matching used in Ignored Courses, the first is a simple **Starts With** comparison where the **Ignored Course** will attempt to match against the start of a course's **Course Code**. The second method uses [regular expressions](#) to match the pattern with the course code. This method is very powerful, but more complicated.

**Ignored Courses** are specific to the **Location**, so you may have different **Ignored Courses** for location.

In our example we will assume the courses we would like to ignore start with **ZZ**.

To add a new **Ignored Course**:

1. From the left-hand menu, click on **Ignored Courses**.
2. Now click on the “+” to add a new **Ignored Course**.
3. In the **Text/Pattern** area enter the pattern you would like to use to match the **Ignored Course**, in this case we will use **ZZ**.
4. Finally, set the **Location** for the Ignored Course and click **Add**.



**Hint:** Below are a couple commonly used regular expressions for common use-cases.

**Block all courses that start with a prefix, with exceptions**

```
(?!^ZZ12345$|^ZZ12346$)^ZZ.*$
```

This value would block all courses that start with ZZ, with the exception of “ZZ12345” and “ZZ12346”. All other courses like “MA12345” would be able to be scheduled.

**Only Allow Scheduling with a few select courses, block everything else**

```
(?!^HR0001$|^MR0002$).*$
```

This value would only allow parents to schedule for two course codes and ignore everything else. This may be common with elementary schools where the same teacher teaches all courses, so the school may only want parents to schedule for their student's homeroom course. The example would allow scheduling for courses "HR0001" and "HR0002".

## 7. Building the Master Schedule



**Warning:** You should **NOT** build or delete the master schedule while Parent-Teacher conferences are active!

The **Master Schedule** in **PowerPTC** takes much of the information that you have previously entered and combines it into a schedule that parents can then schedule into. Typically building the schedule is one of the last things you will want to do, after you confirm that all other information is correctly entered into **PowerPTC**. It is best to minimize changes to your setup once the master schedule has been created and guardians are actively scheduling.

To build the **Master Schedule**:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Build Schedule**.
3. If the **Actual number of records** is not “0” and conference scheduling isn’t currently open to parents, click **Delete Master Schedule** to remove any records from your master schedule.
4. Click on **Build Master Schedule**, this process may take a while depending on your configuration.
5. When complete, confirm that **Number of records expected** equals **Actual number of records**.

After your Master Schedule has been built, it is recommended that you run the **Setup - Problem Prediction Report** in the **Reports** section. This report will report any common potential issues that may be present with your scheduling setup.

### Configuration Changes with an Active Master Schedule

Although it is recommended to minimize configuration changes when you have a **Master Schedule** built and guardians are actively scheduling into it, there are times when this may be unavoidable. Below is a list of configuration changes that are considered safe in relation to your **Master Schedule**.

Days

1. You may make changes to **Scheduling Open Time** and **Scheduling Close Time** on your **Days** without causing issues with your Master Schedule. This is often performed when a district decides to keep scheduling open to parents longer or shorter than originally expected.



**Warning:** All other changes to your **Day** items will likely result in scheduling errors or problems.

### Meeting Places

1. New **Meeting Places** can be added for teachers that may have been missed during initial setup. After the **Meeting Place** is added, you will need to click the **Build Master Schedule** button in the **Build Schedule** section, this will add the absent entries to the Master Schedule. It is very important that you DO NOT delete your Master Schedule before clicking on the **Build Master Schedule** button.
2. When updating a **Meeting Place**, it is safe to modify the following fields on the General tab:
  - a. **Room** (Guardians may already have copies of their schedule with the original information.)
  - b. **Room Description** (Guardians may already have copies of their schedule with the original information.)
  - c. **Floor Number**
  - d. **Floor Description**
  - e. **Sector**
3. It is possible to change a resource from **NOT** being an **Open Schedulable** (on Advanced tab) to being an **Open Schedulable**, but it is not recommended to go the other direction as parents that may have already scheduled with the resource may be lost.
4. It is safe to change the **Open Scheduling Description**.
5. **Break Requests** are safe to change, but have no effect on the Master Schedule once it has been built.
6. Modifying **Breaks** on the **Live Schedule** tab is also safe as it is the only method to change breaks once the Master Schedule has been established.

# Traditional Account User Management

In **PowerPTC**, there are three basic types of user accounts, including **Admin Users**, **Parent/Guardian Users**, and **Teacher User** accounts.

## Password Policy (All Users)

All users in **PowerPTC** are required to use strong passwords to keep everyone's information safe. The following is the password policy active on all user accounts:

1. At least 7 characters long
2. Mixed case
3. At least one number

## Admin Users

**Admin Users** are users that can manage areas or all of your account. By default, there is a single administrative user created for each customer, this is the account that was used to open the **PowerPTC** account. Admin user accounts can be limited by location as well as by role.

## Administrative Roles

Administrative users can be assigned to a single, predefined role. The role defines what features the user has access to within **PowerPTC**. Below are the details of each role available.

The Roles are organized into **Levels** with the higher number level having more privileges than the previous. Each progressive Level has the privileges from the previous level in addition to the features listed in the "Features Available" column below.

Level	Role Name	Features Available
0	No Role	<ul style="list-style-type: none"><li>• User can login, but do little in the way of administration</li></ul>
1	View Users	<ul style="list-style-type: none"><li>• Can view:<ul style="list-style-type: none"><li>○ Parent Account Information</li><li>○ Parent Activation Codes</li><li>○ Teacher Account Information</li></ul></li></ul>

		<ul style="list-style-type: none"> <li>○ Teacher Activation Codes</li> <li>● Can resend activation codes to a single email address at a time</li> </ul>
2	View/Modify Users	<ul style="list-style-type: none"> <li>● Can view, edit, delete, and create: <ul style="list-style-type: none"> <li>○ Parent Account Information</li> <li>○ Parent Activation Codes</li> <li>○ Teacher Account Information</li> <li>○ Teacher Activation Codes</li> </ul> </li> <li>● Can resend activation codes to a single email address at a time</li> </ul>
3	Modify User/Mass Activation Email	<ul style="list-style-type: none"> <li>● Can mass resend activation code information</li> <li>● Can view Teachers, Students, and Courses in the <b>Student Information</b> section</li> </ul>
4	Meeting Places	<ul style="list-style-type: none"> <li>● Can modify, delete, and create <b>Meeting Places</b> in the <b>Configure</b> Section</li> </ul>
5	Meeting Places/Days/Locations	<ul style="list-style-type: none"> <li>● Can modify, delete, and create <b>Meeting Places, Days, and Locations</b> in the <b>Configure</b> Section</li> </ul>
6	All Configuration Manager	<ul style="list-style-type: none"> <li>● Can modify, delete, and, create all settings in the <b>Configure</b> section</li> <li>● Can access all <b>Reports</b></li> </ul>
7	SIS Manager	<ul style="list-style-type: none"> <li>● Can upload, append, and delete Teachers, Students, and Courses in the <b>Student Information</b> section</li> <li>● Required to upload with the <b>Student Exporter Utility</b></li> </ul>
8	SIS Manager with support access	<ul style="list-style-type: none"> <li>● Can create, view, and update Support Tickets</li> </ul>
9	Full Access	<ul style="list-style-type: none"> <li>● Access to all administrative features</li> <li>● Can manage other administrative users</li> </ul>

**Location Limits**

In certain sections of PowerPTC, you can limit what an admin user can access based on location. To enable user limits on an administrator account, you can associate one or more locations to an account by setting **Location Access** on the user’s account. This

field must either be \* (meaning access to all locations), or one or more Location Numbers (must match the location number defined in your Locations) separated by a comma.

One important consideration is that not all sections can be limited by location. One example of an area that is not limited by location would be the Guardian/Parent User section. Guardian accounts are not directly associated with students so an admin user, even if limited by location number, will have access to all guardian accounts.

## Creating an Admin User

To add an **Admin User** account:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **List Admin Users**.
3. Now click on the “+” to add a new **Admin User**.
4. Enter a valid **Email Address** for the new **Admin User**. All user accounts must have unique email addresses.
5. Enter the user’s **First Name** and **Last Name**.
6. Select an appropriate role for the user.
7. Finally click **Add** to create the new **Admin User**.

## Parent / Guardian Users

**Parent Users** are users associated with students and are able to schedule appointments with teachers for Parent-Teacher Conferences. A **Parent User** account, like all other accounts in **PowerPTC**, uses an email address as the user’s login. **Parent Users** can be associated with one or more students (on a single account). Parent accounts can also be associated with multiple organizations or school districts with students at other schools. It is also possible to have a single student linked to multiple **Parent User** accounts. This allows for separated guardians to schedule independent appointments with their student’s teachers.

Select Student Information Systems support Guardian single sign-on with **PowerPTC**. For more information on this topic, please the section titled **Single Sign-On Account Management (Optional)**.

**Parent Users** can be created directly by uploading a CSV file containing parent usernames, passwords, and linked students or by manually creating a single user account. Alternatively **Parent Users** can be created via **Activation Codes**. **Activation Codes** are text-based codes that can be sent via email or traditional mailing to parents to allow them to create accounts which will automatically link their account to your



organization and their student(s). If a guardian already has a **Parent User** (potentially from another organization or school district) they are able to link their existing account to your organization with this same **Activation Code**. **Activation Codes** in **PowerPTC** have expiration dates, after which time they are no longer valid. Starting with version 1.1.0, there is now limited support for single sign-on for Guardian users, see the section below for more information.

When using **Activation Codes**, by default, guardians will need to verify their email address. This is done by sending an email to the new user's email account and having them click on a link to confirm that they are the owner of the email account. The user will not be able to log into their account until it is verified. This option can be disabled, but it is highly discouraged. It is not recommended to disable account verification because if the account isn't verified and a parent enters the wrong email address, student information may be sent to a random recipient.

There is no limit on the number of activation codes that can be generated for a given student, so multiple activation codes could be present for a single student if required (separated parents, etc).

## **Manually Creating a Single Parent User**

To create a single user account for a parent, perform the following:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **List Parent/Guardians**.
3. Now click on the "+" to add a new **Parent User**.
4. Enter the Parent's **Email Address**.
5. Enter the Parent's **First Name** and **Last Name**.
6. Enter a **Password** that conforms to the **PowerPTC** password policy.
7. Enter a **Student Number** that you would like to associated with this account.
8. Lastly, click the **Add** button to add the parent account.

## **Mass Importing Parent Accounts**

If your organization already has a repository of parent email addresses and passwords that you would like to use or you would like to generate passwords for your parents yourself you can mass upload this information via a CSV file.

The file must have the following information:

1. **Parent User File**

- a. **Valid Parent Email Address**  
Globally Unique ID  
(Globally Unique, Text, Required)
- b. **First Name**  
(Text, Required)
- c. **Last Name**  
(Text, Required)
- d. **Password**  
Must conform to the **PowerPTC** password policy  
(Text, Required)
- e. **Student(s)**  
A comma separated list of student numbers to link to this account.  
(Text, Required)

To mass upload Parent Users follow these steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **List Parent/Guardians**.
3. Click the **Import Parents** button at the top of the page.
4. Upload the CSV file outlined above.

### Creating a Parent Activation Code

As stated previously, an **Activation Code** in **PowerPTC** is a string of text characters that can be given to a parent or guardian that will allow them to create an account on **PowerPTC** which will be automatically associated with their students and your organization.

To create a single **Activation Code** perform the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **Parent Activation Codes**.
3. Now click on the “+” to add a new **Parent Activation Code**.
4. Enter the **Student Number(s)** that you would like to be linked to the **Activation Code**.
5. Enter an **Expiration Date** for the **Activation Code**.
6. Lastly, click the **Add** button to add the **Activation Code**.

### Mass Generating Parent Activation Codes

**PowerPTC** can generate an **Activation Code** for every student who doesn't have an outstanding **Activation Code** or existing **Parent User** account. It is common to mass generate Activation Codes, which can later be exported to a CSV file and used as part of a mail merge to send to parents.

To mass generate **Parent Activation Codes** perform the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **Parent Activation Codes**.
3. Click on the **Add for All Parents** button.
4. Select an **Expiration Date** for your **Activation Codes**.
5. To generate the Activations Codes click **Mass Generate Codes**. This process can take a long time depending on your enrollment.

If multiple accounts are required for a single student, which is often the case with separated parents, additional activation codes will need to be manually created for the student as the mass generation tool will only create a single code per student.

Since many parents may have multiple students at your school or district, it is recommend that you use the option **Group Codes By Email** which will merge multiple students into a single activation code. Without this option, parents would then have multiple activation codes, one for each student.

### **Emailing Activation Codes**

Parent activation codes can be sent directly to parents via email given guardian email addresses were uploaded from your student information system. Emailing activation codes can be done when the activation codes are generated or at any point after creation. It is possible to only resend activation codes to a subset of parents. You can resend parent activation codes by performing the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **Parent Activation Codes**.
3. Click on the **Resend Activation Email**.
4. In the confirmation dialog, you have the option to enter a filter string which is used to limit whom you are sending the activation code email to.
5. Click **Resend Activation Email** to resend activation codes.

### **Impersonating General Users**

**PowerPTC** allows for administrators to impersonate parent (and teacher) users. This means it is possible for an admin user to select a parent user account and click the impersonate button (pictured below) to start a session as that user.



When you are impersonating a user, you are able to do nearly anything that they would be able to do if they logged in with their username and password. Impersonated sessions can be very helpful to troubleshoot issues that a parent may be having. Common uses for this function include scheduling for a parent or guardian who is having problems doing so or adding an activation code to an existing account for a parent.

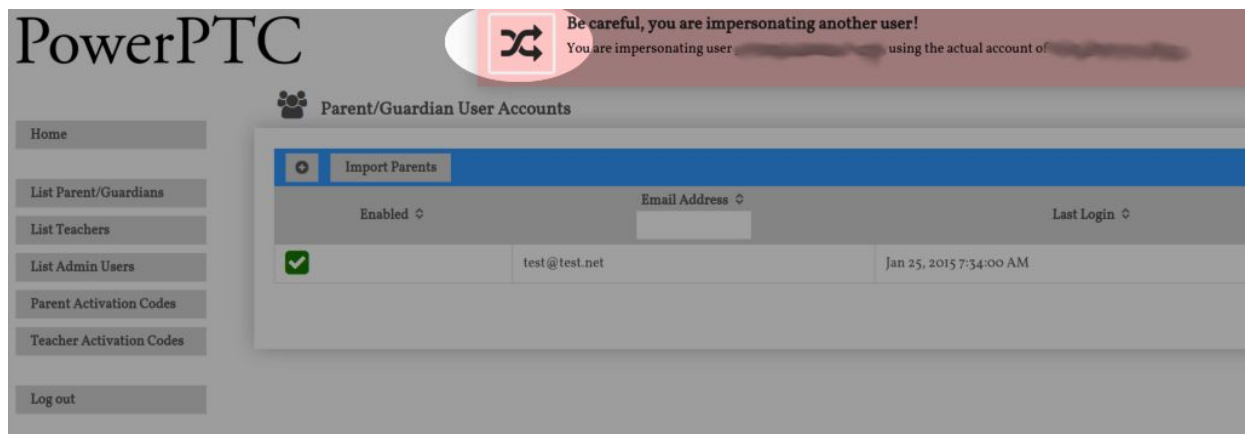
To **Impersonate** a user, perform the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **List Parent/Guardians**.
3. Locate the user you would like to Impersonate and click the **Impersonate** button



under **Actions**.

To end an impersonated session, click on the larger Impersonate button at the top of the page (pictured below).

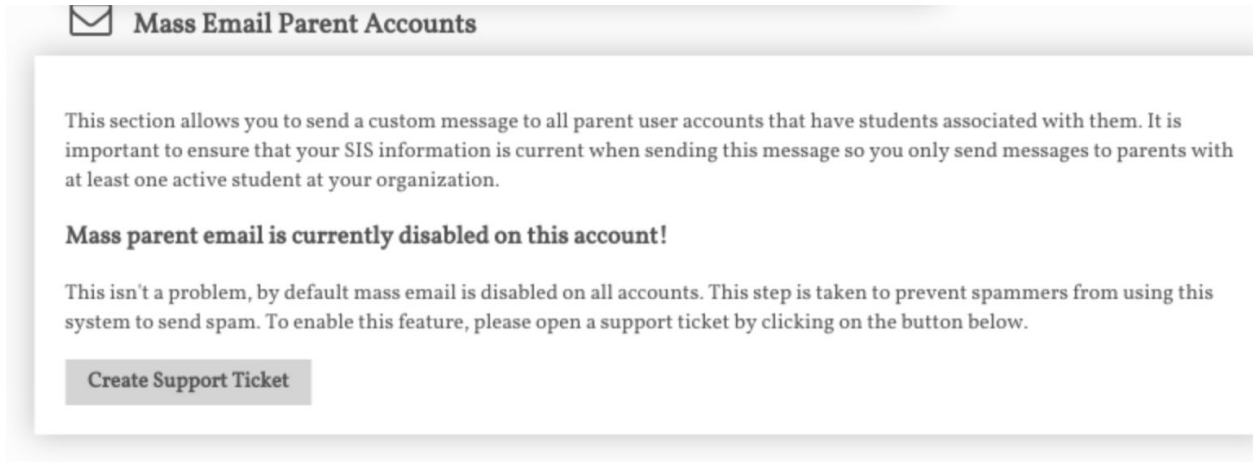


## Mass Emailing Parents

Within **PowerPTC**, it is possible to mass email all guardian accounts having at least one active student associated with their account. An active student is a student that exists in your SIS data which is present on **PowerPTC**. To access the ability to mass email your guardians, perform the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, select **List Parents/Guardians**.
3. Click on the **Email Parents** button.

If this is your first time sending a mass email to parents, you may receive the following message:



If this message is displayed, you must open a support ticket to enable this feature on your account. There is no charge or fee to use this feature, we add this step to ensure that the system is not being abused for non intended uses (IE: SPAM).

Once this feature is enabled, you will be able to a customer email with subject to all your guardians.

## Teacher User Accounts

**Teacher User Accounts** in **PowerPTC** are not required, but allow for added benefits. The advantage of using teacher accounts is that teachers are able to view their schedule easily, schedule appointments for guardians with accounts (optional), and are able to take attendance for their conferences (optional). Without Teacher accounts it is still possible to mass email teachers their schedules as long as teacher email addresses were uploaded as part of the student information upload.

**Teacher User Accounts** can be created one at a time, or via **Activation Codes**. It is possible to mass generate **Activations Codes** for teachers, just as you would for parents. Additionally it is also possible to email teachers their **Activation Codes** given email address information was uploaded with the SIS information.

To create a single Teacher User Account:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **List Teachers**.
3. Click on the “+” to add a new **Teacher User**.
4. Enter a valid **Email Address** for the **Teacher User**.
5. Enter a **First Name** and **Last Name**.
6. Enter a **Password** that conforms to the PowerPTC password policy.
7. Enter a **Teacher Number** that matches a teacher number from the SIS information that you have uploaded.
8. Finally click **Add** to add the new Teacher User Account.

To mass generate Teacher Activation Codes (and email them), perform the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **Teacher Activation Codes**.
3. Click the **Add for All Teachers** button.
4. Enter an **Expiration Date** for the Activation Codes.
5. If you would like the Activation Codes to be emailed to the Teacher after creation, select the option **Send Email**.
6. Finally click the **Mass Generate Codes** button. This process may take a long time depending on the number of codes that are generated and if the email option is selected.

## Scheduling for Parents

With **PowerPTC** it is possible for teachers to schedule appointments for the guardians or parents of students that are enrolled in their courses. This feature is disabled by default, and must be enabled by an administrator. This feature can be enabled by performing the following:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Other Settings**.
3. Check the box associated with the option **Allow Teacher Scheduling**.
4. Click **Update Settings**

After teacher scheduling has been enabled, teachers will see the option to **Schedule Appointment** when they view their conference schedule. There are limits on teacher scheduling including:

- Only able to schedule for parents with accounts
- Only able to create new appointments, may not delete or modify an existing appointment
- Can only schedule appointments when scheduling is open to parents
- Teachers can not see other appointments that a guardian has scheduled with other teacher

## Impersonating Teacher Users

**PowerPTC** allows for administrators to impersonate teacher users as well. This means it is possible for an admin user to select a teacher user account and click the impersonate button (pictured below) to start a session as that user.



When you are impersonating a user, you are able to do nearly anything that they would be able to do if they logged in with their username and password.

To **Impersonate** a teacher, perform the following steps:

1. Click on **Users** from the **Home Screen**.
2. From the left-hand menu, click on **List Teachers**.
3. Locate the user you would like to Impersonate and click the **Impersonate** button



under **Actions**.

To end an impersonated session, click on the larger Impersonate button at the top of the page (pictured below).

The screenshot shows the PowerPTC web interface. At the top left is the logo "PowerPTC". A red warning banner at the top right contains a circular icon with a double-headed arrow and the text: "Be careful, you are impersonating another user! You are impersonating user [redacted] using the actual account of [redacted]". Below the banner is a navigation menu on the left with items: Home, List Parent/Guardians, List Teachers, List Admin Users, Parent Activation Codes, Teacher Activation Codes, and Log out. The main content area is titled "Parent/Guardian User Accounts" and features a table with a blue header row containing "Import Parents" and a gear icon. The table has columns for "Enabled", "Email Address", and "Last Login". One row is visible with a green checkmark in the "Enabled" column, the email address "test@test.net", and the last login time "Jan 25, 2015 7:34:00 AM".

Enabled	Email Address	Last Login
<input checked="" type="checkbox"/>	test@test.net	Jan 25, 2015 7:34:00 AM



## (Optional) Single Sign-on User Account Management

**\*\* BETA - These feature may change or may not be included in future releases \*\***

**PowerPTC** supports two modes for single sign-on, **SAML** and **General SSO**. **SAML** is an industry standard for exchanging authentication information between servers. **General SSO** allows single sign-on with student information systems that don't support SAML, but may have a system specific implementation.

### Saml SSO

#### Overview

SAML Single Sign-on for Guardian users support single sign-on support with select Student Information Systems. Single Sign-on allows your Guardian users to log into **PowerPTC** using their existing login to your district's parent portal. The SAML SSO feature is currently only available for guardian accounts, other accounts including teacher and admin accounts can not currently authenticate using SAML SSO. Before implementing SSO in production, please review the section titled **SSO Limitations**. Below are a few key features of SAML Single Sign-on:

- One account and password for your guardian's to remember
- Password management is done using your organization's parent portal
- New students added to your parent portal are automatically added to their **PowerPTC** account
- Ability to fall-back to a traditional account at any point
- Ability to mix SAML SSO accounts and traditional accounts
- Simplify user management including the potential to eliminate or reduce the need to supply parents with activation codes

Currently supported SSO Student Information Systems:

- PowerSchool SIS (Beta)

When using SAML SSO, the authentication process takes the following form:

#### Login Initiated from Your Organization's Parent Portal

1. A guardian logs into the educational institution's parent portal as they normally would to access their student's information.

2. The guardian clicks on a link (provided by a plugin) for your organization which will redirect the guardian to **PowerPTC**, and **PowerPTC** will determine the organization the user is attempting to authenticate for.
3. **PowerPTC** will then provide a link to redirect the user back to your organization's parent portal where the single sign-on process will begin.
4. Your organization's parent portal will verify that a user is authenticated and then the portal will automatically redirect the user via a browser redirect back to **PowerPTC** with user account information.
5. **PowerPTC** will create an account for a guardian if the user doesn't yet have an account. If the user has an existing account, **PowerPTC** will require the user to verify the new Identity Provider by clicking on a link sent via email.
6. Finally the user will be redirected to the **PowerPTC** home page to start the scheduling process.

SAML SSO accounts can be also be used as traditional **PowerPTC** guardian accounts if your SAML parent portal is not available. To use SAML SSO accounts as a standard account perform the following steps:

1. Navigate to <https://powerptc.net>
2. Click on the **Forgot Password** link.
3. Enter the primary email address associated with the guardian's parent portal account.
4. The guardian account will then be able to login after following the password reset instructions sent via email.

SAML Single Sign-on is currently limited to PowerSchool SIS. The steps in this section will guide you through the setup and configuration required for SAML SSO. Many of the steps in this section will require an administrative account for your PowerSchool installation.

Below is an outline of the steps required to configure SSO for your organization.

1. Request to have SAML SSO enabled on your **PowerPTC** account.
2. Install the PowerSchool Plugin on your PowerSchool server.
3. Export your guardian ID to guardian email mappings via the **Student Exporter Utility**.
4. Configure the **Authentication Settings** in **PowerPTC**.

## Request SSO to be Enabled on Your Account

In order to use SAML SSO on your account, it must be enabled by opening a support ticket simply asking for it to be enabled. Please see the **Support** section of this documentation for more information on opening a support ticket.

## Install the PowerSchool Plugin

The **PowerPTC** plugin for PowerSchool must be installed in order to use PowerSchool as SAML Identity Provider. This plugin can be downloaded by any administrative account in **PowerPTC**. To download the PowerPTC plugin for PowerSchool, perform the following steps:

1. Log into **PowerPTC.net** as an administrative user.
2. Click on **Configure** from the **Home Screen**.
3. From the left-hand menu, click on **Authentication Settings**.
4. Click on the link titled **Download the Powerschool Plugin**.

The following steps need to be performed on your PowerSchool server. Please note that these steps may be different depending on your version of PowerSchool. Please ensure that you have a backup of your server prior to making these changes.

1. Log into the administrative area of PowerSchool.
2. In the left-hand menu, select **System** under the Setup section.
3. Under the Server section, select **System Settings**.
4. Select **Plugin Management Configuration**.
5. Click the **Install** button.
6. Upload your **PowerPTC** plugin file and click **Install**.
7. Enable the **PowerPTC** plugin by clicking on the checkbox in the Enabled/Disable column associated with the **PowerPTC** plugin.
8. Now click on the **PowerPTC** plugin title.
9. Click on the link titled **Single Sign-on Service**.
10. There are a few settings we need from this screen in PowerSchool that we will need to save for the future section. It is recommended that you copy and paste these values into a text file for later retrieval.
  - a. Record the value associated with **Entity ID**.
  - b. Right-click on the link titled **View PowerSchool IDP Metadata** and select the browser specific option to copy the link address and then paste that value into your text file.
11. Finally, select the appropriate certificate in the **Single Sign-On Certificate** selection box and click **Save**.

## Upload Guardian Email Mapping

Due to a limitation in PowerSchool's SAML IDP implementation, it is required that you upload supplemental information that will map a GuardianID from PowerSchool to a Guardian's Primary Email address, which is what is required to generate an account in **PowerPTC**. This is a simple file that needs to be uploaded to **PowerPTC** and is exported with the **Student Exporter Utility**. For more information on using the Student Exporter Utility, please see the section titled **The Student Exporter Tool**. Included with this export, in the **app/export** folder, will be a file titled **6-optional-saml-email.csv**.

Once this file has been generated, it can be uploaded by performing the following steps:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Authentication Settings**.
3. Click on **Upload Mappings** and upload this file in this section.

## Configuring Authentication Settings

There are just a few more settings that need to be setup within **PowerPTC** for SAML SSO to function. It should be mentioned that when these settings are changed, it will take 15 minutes before the settings will be applied. In this step, we will use the values recorded during the PowerSchool plugin installation step.

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Authentication Settings**.
3. Click on the checkbox to **Enable SAML**.
4. Enter the **IDP Metadata URL** copied in a previous section.
5. Enter the **IDP Entity ID** also copied in a previous section.
6. Click **Update Settings**.
7. Click on the **Refresh Now** link to query the IDPs metadata.

## SSO Limitations

### The Guardian Email Mapping

Your organization will need to periodically update your Guardian Email mappings. If a mapping doesn't exist for a guardian attempting to authenticate, they will not be able to login to **PowerPTC**.

This limitation very important to note, because if a parent creates a new guardian account, then wishes to use their account for SSO with **PowerPTC** prior to your organization updating the Guardian Email mappings, the end user will receive an error. They will not be able to schedule until the Guardian Email mappings have been pulled from PowerSchool and are updated in **PowerPTC**. This limitation is due to limitations in the implementation of PowerSchool's SAML system.

### SAML Cache Time

With SAML SSO, changes made to the Authentication Settings may not take place for 15 minutes. This is a result of multiple tiers of caching involved with SAML metadata.

### Custom URL

When using SSO, it is important that guardians be provided the **Custom URL** (in the **Site Customizations** section) that is specific to your organization. When using this URL, **PowerPTC** can provide a customized login interface with links to your SAML IDP server. This Custom URL should be used for links you provide to parents on any digital or traditional communication.

By default, using the custom URL will present users with a landing page where they'd need to choose if they are a guardian or a teacher/admin user. You can automate the SAML SSO process by using the following URL:

[https://www.powerptc.net/powerptc/c/\[customernumber\]/6](https://www.powerptc.net/powerptc/c/[customernumber]/6)

In this case, you'd need to replace, "[customernumber]" with your organization's customer number. The number 6 at the end is static and should be changed, this is a flag to the application hint it to redirect the user directly to the SAML SSO server. This URL is useful when you are redirecting the user from a web application when the user has already performed the needed SSO authentication process (like from within the PowerSchool Parent Portal).

### Adding SSO to an Existing Account

New accounts created using SAML SSO will be generated seamlessly, but existing users with non-SAML SSO accounts wishing to add SSO functionality will need to validate the change to their account via an email confirmation code.

### Miscellaneous PowerSchool Related Issues

- Some users have reported that specific versions of PowerSchool have required them to restart the PowerSchool service in order for **PowerPTC's** metadata to be correctly cached.
- There are some instances where PowerSchool will not correctly redirect a user back to PowerPTC.net including when a user's account requires a password change. After the password change in PowerSchool's Parent Portal, the user will be directed to the parent dashboard.
- If a user changes their account's primary email address in the parent portal, their account will no longer be linked to **PowerPTC**.

### Other Issues

- For large districts, using SAML SSO can place a large burden on your PowerSchool servers when Parent-Teacher Conferences are open. It is not uncommon to see 25-50% of your guardians attempt to login within the first 30 minutes of scheduling. Since your organization's servers are required to handle authentication, this can place a burden on your systems.
- There are a few instances where **PowerPTC** will require a user to validate adding a SAML Identity Providers (IDP) to their account. The validation process is done by sending the user an email with a confirmation code that must be entered on **PowerPTC**. The reason for this validation is to prevent third-parties from hijacking a user's account. These situations include:
  - a. When the user attempts to add a SAML IDP to an existing **PowerPTC** account that isn't associated with any SAML IDPs.
  - b. When the user attempts to add a 2nd, 3rd, etc SAML IDP to their account.

## General SSO

### Overview

General SSO in **PowerPTC** is a method for supporting single sign-on with systems that do not support SAML but may have other methods to implement single sign-on, or a single sign-on like experience. General SSO is currently only available for guardian accounts, other accounts including teacher and admin accounts can not currently authenticate using SSO. Before implementing SSO in production, please review the section titled **SSO Limitations**.

Student Information Systems known to work with General SSO:

- Infinite Campus (Beta)

Below is an outline of the steps required to configure SSO for your organization.

1. Request to have SSO enabled on your **PowerPTC** account.
2. Upload your **User Information**.
3. Configure the **Authentication Settings** in **PowerPTC**.

## Request SSO to be Enabled on Your Account

In order to use SSO on your account, it must be enabled by opening a support ticket simply asking for it to be enabled. Please see the **Support** section of this documentation for more information on opening a support ticket.

## Upload Guardian Account Information

In order to use SSO, the first thing you must do is upload a file containing the users you would like to be able to log into **PowerPTC**, and which students those users should be associated with. The file template for this upload can be downloaded by navigating to:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Authentication Settings**.
3. Click on the **General SSO** tab.
4. Click on **Upload Mappings** and click on the **SSO User Template**.

This file contains the following fields:

1. **Username** - The guardian username used to authenticate on the SIS system.
2. **Guardian First Name** - The first name of the guardian. This is used to populate an account on PowerPTC with the guardian's name
3. **Guardian Last Name** - The last name of the guardian. This is used to populate an account on PowerPTC with the guardian's name
4. **Email Address** - The guardian's email address, this must be unique for your district. For each email address, only one account can be associated. This field is used to generate an account on PowerPTC.
5. **Students** - This field contains one or more student's that will be associated with this account separated with a comma.

Once this file has been created, it can be uploaded by performing the following steps:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Authentication Settings**.
3. Click on the **General SSO** tab.
4. Click on **Upload Mappings** and upload this file in this section.

## Configuring General SSO Authentication Settings

Please see the **Documents and Files** section of **PowerPTC** for SIS specific configuration settings.

To complete the configuration of General SSO, the settings can be configured by performing the following:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Authentication Settings**.
3. Click on the **General SSO** tab.
4. Click on the checkbox to **Enable SSO**.
5. Select a **SSO Type**.
6. Enter the **URL Template**.
7. Enter a valid **Regular Expression for Success** to handle the response.
8. Click **Update Settings** to save your changes.

## SSO Limitations

### The Guardian User Account Mapping

Your organization will need to periodically update your Guardian Account Information mappings. If a mapping doesn't exist for a guardian attempting to authenticate, they will not be able to login to **PowerPTC**.

This limitation very important to note, because if a parent creates a new guardian account, then wishes to use their account for SSO with **PowerPTC** prior to your organization updating the Guardian Email mappings, the end user will receive an error.

### Custom URL

When using SSO, it is important that guardians be provided the **Custom URL** (in the **Site Customizations** section) that is specific to your organization. When using this URL, **PowerPTC** can provide a customized login interface that will connect with your SSO server. This Custom URL should be used for links you provide to parents on any digital or traditional communication.

### Adding SSO to an Existing Account



New accounts created using SSO will be generated seamlessly, but existing users with non-SSO accounts wishing to add SSO functionality will need to validate the change to their account via an emailed confirmation code. This step is taken to prevent user accounts from being taken over by unauthorized SSO providers.

### Other Issues

- For large districts, using SSO can place a burden on your SIS servers when Parent-Teacher Conferences are open. It is not uncommon to see 25-50% of your guardians attempt to login within the first 30 minutes of scheduling. Since your organization's servers are required to handle authentication, this can place a burden on your systems.

## Other Administrative Settings

### Miscellaneous Settings

There are a few miscellaneous scheduling related options available in the **Configure** section, under **Other Settings**. The settings available in this area are listed below.

#### Display Student's Grade

The **Display Student's Grade** setting allows you to turn on or off the display of student's grades to parents.

#### Display Absences

The **Display Absences** settings allows the organization to turn on or off the display of student absences that were uploaded from the student information system.

#### Display Comments

The **Display Comments** settings allows the organization to turn on or off the display of teacher comments that were uploaded with from the student information system. When enabled, the comments are only present on the PDF schedule for parents.

#### Require Guardian/Teacher Email Verification

This option allows for the organization to disable the account verification step when using **Activation Codes**, but this is highly discouraged. Account verification is used to ensure that student information is only sent to the intended recipient.

#### Allow teachers to select their own breaks







When this option is enabled, teachers are able to select their break time requests. In order for this to function, a **Meeting Place** must exist for the teacher requesting the break time. This setting only applies to break requests and must be performed prior to the building of the master schedule.

## Default Scheduling Mode

The Default Scheduling Mode allows you to choose which scheduling method will be displayed to guardians by default. The automatic scheduler will ask the user to only select a start date and time and build their schedule for them. The manual scheduler requires guardians to select the individual appointments for each Meeting Place one by one. The manual scheduler might be preferred in instances where only one or two teachers will be scheduled per guardian. This is common in K-5 schools. This settings doesn't force a scheduling mode, it only sets the default.

## Parent Questions or Comments

It is possible to allow parents to leave a comment or ask a question after they have scheduled an appointment with a teacher. This feature is disabled by default, and when it is enabled the following icons will be displayed after an appointment has been scheduled.

Appointment	Location	Period	Course	Teacher	Grade
 Dec 1, 2015 9:40 AM - 9:45 AM		1(A)	Chemistry Honors	 Teacher184 Teacher184	A (90%)
 Dec 1, 2015 9:50 AM - 9:55 AM		11(A)		 Teacher182 Teacher182	
 Dec 1, 2015 10:30 AM - 10:35 AM		2(A)	English 10 Honors	 Teacher465 Teacher465	A (92%)

The green icon signifies that a comment has been left for that appointment. The benefit of allowing parents to ask questions prior to the start of a conference is that it allows teachers to prepare and research specific questions that a parent may have at conferences. This can take some of the pressure off of a teacher by allowing them to prepare an answer instead of being put on the spot in front of a parent. The questions left in this section will also be printed on the teacher's and the parent's PDF schedule.

## Contact Requests

When a teacher or staff member's conference schedule is saturated, if Contact Requests are enabled, parents will be provided a button requesting to be contacted by the staff member. These requests are then printed out on a teacher's schedule, when this report is generated.

## Email Templates

PowerPTC has the ability to send various email messages. Many of these messages can be customized to better fit your organization's needs, via **Email Templates**. Each **Email**

**Template** consists of an email subject, html body, and a text body. Each of these three components can be customized in terms of content and basic formatting. In addition, it is possible to inject variables into the templates to further customize the message being sent to the recipient. Variables in Email Templates take the form, **#{variablename}** and depending on the variables available to the template, can be used to insert information including, guardian names, user information, organizational information, etc. To modify your organization's email templates, perform the following:

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Email Templates**.
3. Click on the **Email Template** you would like to modify.

## Special Requests

It is possible in **PowerPTC** to define **Special Requests** which are predefined requests that parents may select and associate with their appointments. These requests are available to parents or guardians after scheduling their appointments. Common uses for **Special Requests** include requesting translators, or allowing for assistance with persons with limited mobility. Your organization can then run reports on **Special Requests** to use this information as you see fit. Below are the steps to create **Special Requests**.

1. Click on **Configure** from the **Home Screen**.
2. From the left-hand menu, click on **Special Requests**.
3. Now click on the "+" to add a new **Special Request**.
4. Give the special request a Title, Description, and Location.
5. Click the **Add** button to save your Special Request.

## Customer Settings

There are various other settings and information that are available for administrative users including account subscription expiration information, contact information, and time zone settings. This information can be found by navigating to the **Configure** section, then selecting **Customer Settings** from the left-hand menu.

## Customizing the PowerPTC Interface

It is possible to customize **PowerPTC** with your organization's logo and a message to be displayed to your users on the login page. To customize the PowerPTC interface, you will need to log in as an administrator and navigate to the **Configure** section, then select **Site Customizations**.

Near the top of this page you will find a URL that should be displayed to your users to allow them to access PowerPTC with your organization's specific customizations. If your organization publishes a link on their website to **PowerPTC**, this is the address that should be used.

## Logo

Further down this page you will see a section titled **Custom Logo**. This section allows you to upload a single customized logo for your organization. It is recommended that the image be 578px wide and 120px tall. The image will be scaled down to 289px by 60px to support higher pixel density displays. We also recommend using a PNG file with a transparent background for best results.

## Login Message

On the Custom Login Message tab you will see a text editor which will allow you to enter a message to your users which will be displayed on the login screen. This message allows for simple html/text formatting include lists, links, etc.

## Custom Scheduling Message

On this tab, you can enter a simple message that will be displayed on the scheduling page for parents, if you need to provide them with additional information. This message will be displayed on both the Automatic Scheduling page as well as the Manual Scheduling page.

## Mass Delete or Purge Data

It is often required that you may need to mass delete or remove information from your account including student information data, Meeting Places, Days, user accounts, etc. To mass remove information from your PowerPTC account:

1. Click on **Configure**
2. Click on **Customer Settings**
3. Click on the **Purge Data** link
4. Select the items you would like to permanently remove from your account and click **Delete Selected Items**



## Reports

**PowerPTC** provides numerous reports which allow you to view and export your information. To access the reports, navigate to the **Reports** section. From this section you can run a report by clicking on the report title.

There are a few reports we would like to highlight as they are either used often or can be very helpful.

### Setup - Problem Prediction Report

This report looks for some common issues encountered by users and attempts to report them back to you. This report should be run after all information has been entered into PowerPTC and before scheduling is opened for parents.

### Teachers - Schedules (Emailed)

This report will email every teacher their conference schedule. This is a useful report when Teacher User accounts are not used.

### Parents - Schedules (Emailed)

This report will email every parent with their conference schedule. This is useful to send parents a reminder of their appointments prior to conferences.

## Support

The support section of **PowerPTC** is the primary method resource for getting assistance with **PowerPTC** as well as accessing documentation and other resources.

### Support Tickets

Support Tickets are the primary method of getting assistance with **PowerPTC**. In the support section it is possible to open a support ticket, a feature request, or ask a general question.

## Appendix A: Custom DataSources.properties

The following steps will outline the process for replacing your datasources.properties file for use with the Student Exporter Utility. A custom datasources.properties may be required when you have special or unique needs when exporting data from your student information system.

- Ensure you are using the latest version of the Student Exporter Utility. The latest version can be downloaded from:  
<https://www.powerptc.net/powerptc/file/kPeaKhlhL0Gr3mN2QaOz16PH0>
- Unzip the archive
- Copy the datasources.properties file provided by CWS Software LLC to the [powerptc-student-exporter-folder]/app/datasources.properties

Double-click on PowerPTCStudentExporter.exe and perform an export.



## **Appendix B: File Converter**

The File Converter utility is a graphical tool that allows for the conversion of data from select Student Information Systems (including Infinite Campus) where the Student Exporter may not be available. These are typically student information systems that do not allow direct database access via third-party tools. The File Converter application should only be used when you are directed by support, as in most cases a customer mapping configuration file will need to be provided. The primary use-case for this application is to take a single CSV file from a SIS system which may contain students, schedules, and teachers in a single file, then split the single file into the five files required by PowerPTC. This application uses a configuration file named `mapping.properties` to map which fields from the single CSV file will be used on the output files.

## **Appendix C: Other Resources**

### **Go Live Checklist**

This document contains a high level checklist of items that should be completed before opening your Parent-Teacher conferences.

<https://www.powerptc.net/powerptc/file/D13XkuALNNpaQ2mapFuVG3FSX>

### **Student Information Sample Data**

The following link contains a small sample of student information data that can be used to test out PowerPTC without having to import your Student Information Data.

<https://www.powerptc.net/powerptc/file/uunhJenUR8o5K1MI6Ik8XOb8c>