

PowerPTC

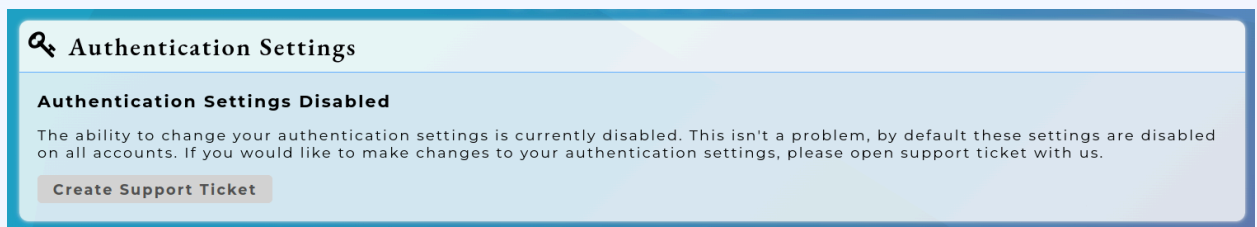
PowerSchool Plugin, Single Sign-on, and Direct Sync Quick Start Guide

Overview

This guide will provide you with the steps required to set up **PowerPTC** plugin for PowerSchool, configure single sign-on using SAML, and setup Direct Sync.

Step 1 - Request SAML Activation on Your Account

- This step is only needed if you encounter the following error while attempting to configure single sign-on.



- If the above message is encountered, log in to your account at <https://www.powerptc.net>
- Go to the **Support** section and click on the “+” button to open a support ticket with the title “Enable SAML SSO”.

Step 2 - Install the PowerSchool Plugin

Once SAML has been enabled on your organization’s account, you will need administrative access to your PowerSchool server to perform some of the following steps.

In PowerPTC:

1. From the home screen of PowerPTC, click on the **Configure** section.

[2]

2. Click on **Authentication** Settings
3. Change the **SAML Mode** setting to **PowerSchool SAML Translator**
4. Click on the **Update Settings** button
5. Click on the link to **Download the PowerSchool Plugin**

In PowerSchool:

1. Log in to the administrative area of PowerSchool.
2. In the left-hand menu, select **System Management -> Server -> Plugin Configuration**.
3. Select Plugin Management Configuration, then click the **Install** button.
4. Upload your PowerPTC plugin zip file and click **Install**.
5. Enable the PowerPTC plugin by clicking on the checkbox in the Enabled/Disable column associated with the PowerPTC plugin.
6. Click on the **PowerPTC** plugin title.
7. Click on the link titled **Single Sign-on Service**.
8. There are a few settings we need from this screen in PowerSchool that we will need to save for the future steps. 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.
9. Finally, select an appropriate certificate in the **Single Sign-On Certificate** selection box and click Save.

In PowerPTC:

1. Click on **Configure** from the Home Screen.
2. From the left-hand menu, click on **Authentication Settings**.

[3]

3. Click on the checkbox to **Enable SAML**.
4. Enter the **IDP Metadata URL** copied previously.
5. Enter the **IDP Entity ID** also copied previously.
6. Click **Update Settings**.
7. Click on the **Refresh Now** link to query the IDPs (PowerSchool's) metadata.

Due to numerous factors, you will need to wait at least 15 minutes prior to testing SSO (step 4) in the steps below.

Step 3 - Test out an Account

In this instance we will test out a guardian account for single sign-on, you will need a valid guardian account on your SIS to test with. You should also log out of PowerSchool if you are currently logged in as an administrator. We also need to obtain your **PowerPTC** customer specific URL. This URL is used to specify the organization you are attempting to authenticate with. To obtain this URL, perform the following:

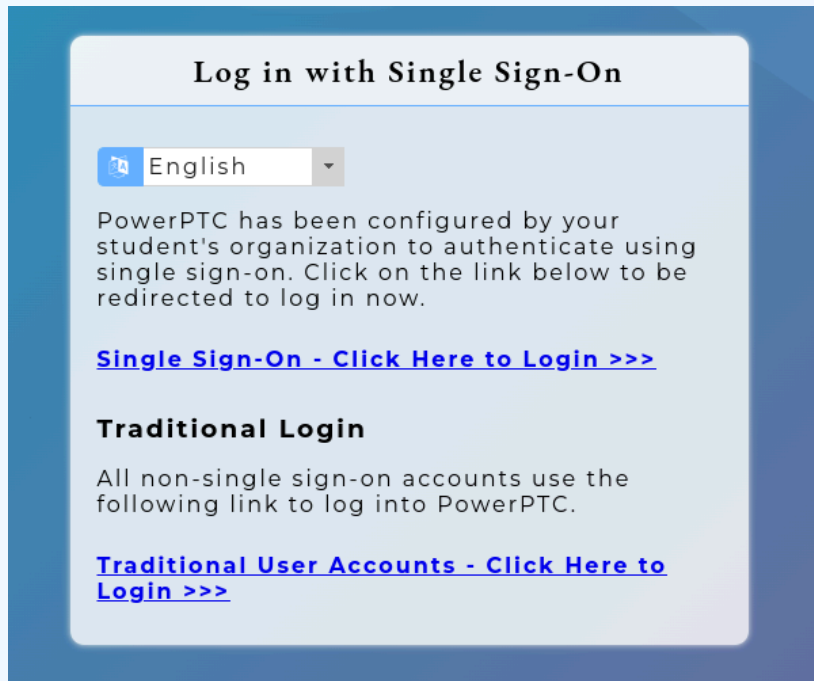
1. Log into **PowerPTC.net** with an administrator account and go to the **Configure** section
2. Select the **Site Customizations** menu item
3. Record the address defined under the **Custom URL** area
4. Log out of **PowerPTC**
5. Enter the **Custom URL** into your browser

See the following video to view how the rest of the authentication process should occur.

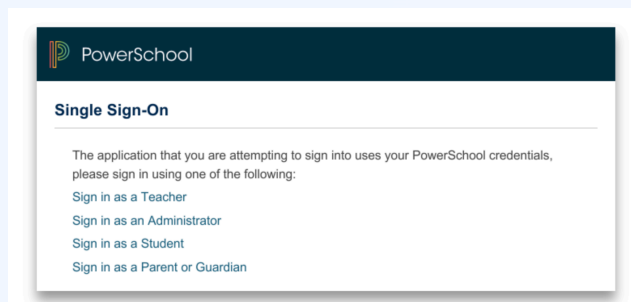
http://www.cwssoft.com/?page_id=1678

After entering your PowerPTC customer specific URL, you should see the following dialog box instead of the standard login prompt.

[4]

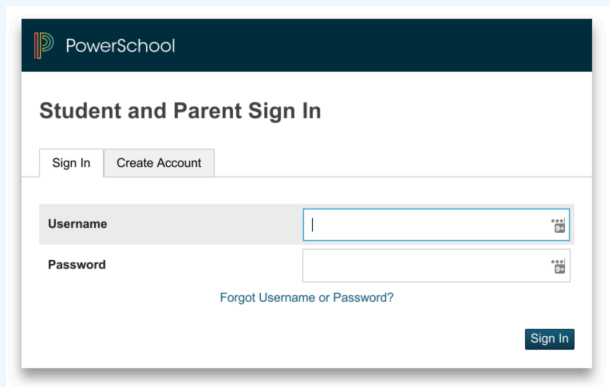


After clicking on **Single Sign-on - Click Here to Login** you should see the following screen from your PowerSchool server.



After clicking on **Sign in as a Parent or Guardian**, you will be brought to the Guardian login page (displayed below).

[5]

The image shows a screenshot of the PowerSchool login page. At the top left is the PowerSchool logo. Below it is the heading "Student and Parent Sign In". There are two tabs: "Sign In" (which is active) and "Create Account". Below the tabs are two input fields: "Username" and "Password". Each field has a small icon on the right side. Below the password field is a link that says "Forgot Username or Password?". At the bottom right of the form is a "Sign In" button.

After authentication is successful, you should be redirected to PowerPTC and automatically logged in.

Step 4 - Set up Direct Sync

Direct Sync allows for syncing your SIS data from within the PowerPTC web interface. The Direct Sync option will connect to your SIS system, extract SIS data, convert it into a format that will be then be passed into the normal SIS data import process in PowerPTC. The results of this import can be viewed in the **Student Information** section. Currently, this is only supported for PowerSchool instances with the PowerPTC plugin installed. To set up Direct Sync, perform the following steps:

1. First, set up single sign-on and the PowerS with the steps outlined in the section **(Optional) Single Sign-on User Account Management**. This section will help ensure that you get the PowerSchool plug installed.
2. In the administrative settings of PowerPTC, navigate to the **Configure** section.
3. From the left-hand menu, select **SIS Sync Settings**.
4. Select **PowerSchool SIS** from the **SIS Sync Type** section.
5. You will need to provide the **Client ID** and **Secret** from the plug section of your PowerSchool server. This can be found in your PowerSchool instance by navigating to **System Management -> Server -> Plugin Configuration**. Locate the PowerPTC Plugin and click on the plugin title.
6. In the **Function** section, select **Data Provider Configuration**.

[6]

7. The **Client ID** and **Secret** will be available in the **OAuth Credentials** section, copy these values into PowerPTC.
8. Finally, enter the **Hostname** of your PowerSchool server; this should take the form of **yourdistrict.powerschool.com** if PowerSchool hosts your PowerSchool server.
9. Click the **Save your SIS Settings** button.
10. Test your configuration by clicking **Run Sync Now**.

If you have any questions or comments about this update, please reach out at support@cwsssoft.com or open a support ticket, we'd love to hear from you!