District Administrator's Guide

Overview

The SCM Workflow Plugin began as an initiative between Brian Wynder at Elk Island Catholic and David Lorenson at Red Deer Public, who initially used it simply to as an easier way to store and manage grades.

Over time we came up with additional sets of useful reports until it became a fairly cohesive and powerful suite of reports and functions, all tailored towards enabling a district to have firm control over the status of course mark submissions.

This customization is only optimized for use within the province of Alberta. It relies heavily upon the existence of the Alberta state reporting fields. Users outside of Alberta who do not use the PASI Reporting process are welcome to scavenge it for ideas, but should not attempt to use it directly within their production environments.

There are links to help files for individual functions available on the "Workflow Overview" screen (the first screen that is visible when you initiate the workflow). This district administrator's guide is intended primarily for district admins and covers the following key concepts:

Note on PASI Usage Agreement

As this tool utilizes PASI information subject to the requirements of the PASI Usage agreement.

Key elements to be aware of in relation to this are as follows:
1) The SCM Plugin utilizes the PowerSchool environment for all reads and writes made through it. As a result of this:
    a) The tool is as secure as your overall PowerSchool installation is
    b) Any write actions made through this tool generates events and thus are audited to the same degree that any change using built-in PowerSchool functionality is made.

2) The SCM Plugin does provide Core Alert information to users who are granted access to it. As a result, districts are responsible for ensuring that any user granted access to this tool is a district employees or persons with a contract who have legitimate reason to access student records for purpose of
    a) Maintenance of said records or
    b) Delivery of an educational program to students

3) The SCM Plugin utilizes the PASI local copy and functions only in relation to students currently or previously at your school and synchronized through PASI Association rules. As a result, PASI rules regarding student association are automatically enforced through the standard PowerSchool integration.

Plugin Contents

Currently the plugin will create the following folders and files:

/admin/reports/SCMPlugin/	Folder	Contains the core files and images used throughout the software
/wildcards/SCMWorkflowTabs.txt	File	Contains the tabs for the main report suite
/wildcards/SCMAlbertaEdCredit.txt	File	Contains the code a district can insert into an existing student page to show the alberta ed credits.
/admin/students/more2.scmenrollments.leftnav.footer.txt	File	The file is used to insert the CEU Audit functionality into the menu on admin portal student screens
/admin/reports/reporttabs.scmplugin.report.tabs.txt	File	The file used to insert the SCM Workflow tab on the System Reports Screen

*Note: A number of districts have found that the insertion points didn't automatically function in their environment.

When looking at it, these districts had customized their more2.html or reporttabs.html files prior to PowerSchool creating insertion points.

If this happens in your environment you can either add the correct insertion point tag (e.g. ~[cust.insertion_point:report.tabs] on the bottom of the runreports.html screen) or manually add the links to your custom pages wherever you wish them to appear.

Plugin Installation

To install the plugin, do the following:
1) Download the ZIP file containing the plugin files. (the zipped version is the one that is installed - you are welcome to extract it to look at the files, but you will need the zip file itself to install it)
2) In PowerSchool go to System -> System Settings -> Plugin Management Configuration and click "Install".
3) Click "Choose file" and point to the zip file containing the plugin, then click "Install"
   Note: At the current size of the plugin it has been observed to take 10 minutes in some environments to install it. Please do not panic, simply let the installation proceed.
4) After the plugin has completed installation, it will be visible on Plugin Management Dashboard with a blank checkbox beside it. When you click the checkbox to enable the plugin, it will prompt you with the warning from PowerSchool to allow it to activate.

The plugin consists of **Page Customizations Only**. If the version of the plugin you are installing attempts to create any custom fields, **do not proceed with installation**.

Once the plugin is installed and enabled, a new menu item should appear when you click on

"System Reports" called " SCM Workflow ". If you wish to create your own link to the plugin from somewhere else, you can use /admin/reports/SCMPlugin/SCMWorkflowOverview.html to link it.

Changelog

The changelog can be viewed from the Workflow Overview screen by clicking "View changelog" at the bottom.

Alternatively, it can be viewed in custom page manager by viewing /admin/reports/SCMPlugin/changelog.txt

Customizing the Workflow

When you click on the workflow, there are a number of tabs across the top of the screen:

Overview - The overview, which also links users to all help files

Review PASI Core - This screen provides graphical status summaries at district / school level

Review Sections - This screen allows users to review the sections they have in the system.

Set Defaults - This screen links users to the "Alberta State Reports" screen

Review Dropped - This screen assists users in reviewing inactive course enrollments

Preparing Stored Grades - This screen is allows you to view the current status of stored grades in your system, and allows you to generate various types of file suitable for importing grades instead of using the permanently store grades process.

Approve Course Marks - This screen directs users to the approve course marks screens built into PowerSchool by the Alberta State Reporting team.

S1 S2 - The exact tabs will differ depending upon the setup and which school you are currently viewing. They are based upon the "Final Mark Store Codes" you have selected for the current year under school -> Years and Terms (example shown below).

- *The Semester tabs are just png files that have the semester name to it. (SCMWF_S1.png) If you have a semester that isn't showing properly you can create the new image. It is 100x100 pixel image.*

Alberta Information Required for PASI Direct Connect.		
Alternate Term Code	Semester 1 ▼	Required for Sections.
Final Mark Store Code	S1	Required for Marks.
Exclude Events	☐	

You can choose to remove any of these tabs by directly editing the file /wildcards/SCMWorkflowTabs.txt. Each pair corresponds to a tab as seen in the example below:

  <li width="140px">
      <img src="Images/SCMWF_Overview.png" width="100" height="40" alt="Workflow Overview" Title="Workflow Overview">

      <img src="Images/SCMWF_ReviewPASICore.png" width="100" height="40" alt="Review and Resolve PASI Core Alerts" Title="Review and Resolve PASI Core Alerts">

Enabling the Submit Buttons

There are several screens where we as the designers of the plugin have built-in the ability to directly edit fields on the database.

Not every district (in fact, almost NO district) would want to give this functionality to every single one of their users.

As a result, the "Submit" buttons on the following screens are "commented out" in the published version of the plugin:

admin/reports/SCMPlugin/SCMCurrentStatusDetailedReview.html
admin/reports/SCMPlugin/SCMDroppedStudentReview.html (**Parameter submit button still visible, mass edit submit button hidden)**
admin/reports/SCMPlugin/StoreGradesCourseReview.html

To make the submit buttons visible and usable again, remove the following code (highlighted) surrounding it:

    <!-- SUBMIT BUTTON DISABLED: By removing the start and end comment tags around this submit button, you affirm that you recognize this button will trigger changes to multiple records in your database at once, that you have configured the permissions on this page to your satisfaction and that you are willing to permit the mass edit of information by this screen by the users you have chosen to authorize.
        <input type="hidden" name="ac" value="prim">~[SubmitButton]
-->

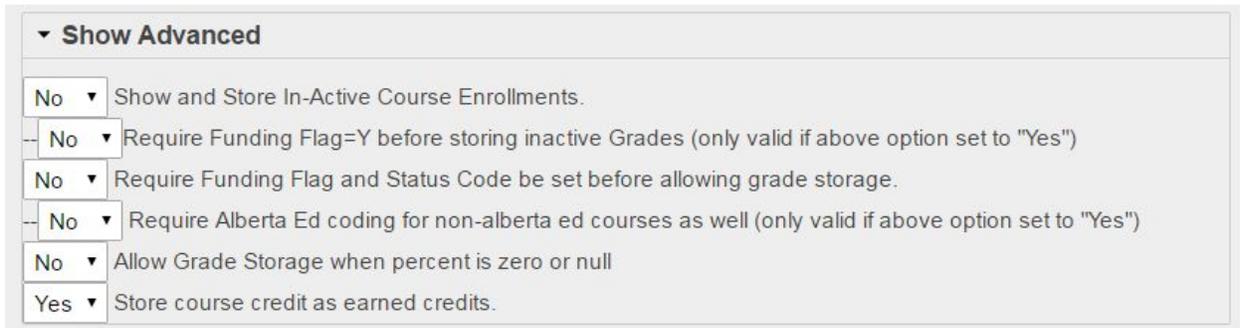It is recommended that a district perform the following steps before choosing to un-comment these submit buttons

1) Determine which of the screens you are comfortable allowing the use of the mass-edit functionality. **It is recommended that only District Administrators be given access to the "SCMCurrentStatusDetailedReview.html" screen.**

2) Use the " Access to Page Permissions " ability under the System menu to set which groups you are comfortable with using the mass-edit functionality on these screens. (Set to "Read Only" any of the screens where you do not wish to allow certain groups to edit)

Note: Setting the "Review Dropped" page to be read-only prevents functioning of the upper parameter chooser, as users would be unable to click submit. However, typical usage of this screen would be for users to only modify a small number of enrollments, which could be modified one enrollment at a time by clicking on the student's name.

Once you have done this, you can simply remove the comment text that surrounds each of the submit buttons on these screens.

Default Parameters for the Preparing Stored Grades Screen

The stored grades screen comes with a number of advanced parameters that you can set

Note: If you do not require the funding flag to be set before allowing grade storage, it will be default to storing all of the grades given the parameters chosen.

If you are working within an environment where you want very granular grade storage (e.g. an Outreach program), it is worth considering allowing funding flag and status code to be set before allowing grade storage - this allows you to very specifically choose which enrollments to store (by very specifically choosing which ones to set the coding for).

If you wish to use the stored grades process within your environment, you may choose to change the default choices on this screen. Currently that would be done by directly editing the following code within the file /admin/reports/SCMPlugin/StoreGradesDashboard.html:

1) Use CTRL-F to find the following text "Show Advanced"
   <h3 class="toggle collapsed">Show Advanced</h3>
2) Each of the parameters is listed as a dropdown. To mark a given choice as selected put the word "selected" after that choice, otherwise if none are selected the first one in the list is default:

<div id="aparams">
   <select name="InactiveStore" id="InactiveStore"><option value="N">No</option><option value="Y">Yes</option></select> Show and Store In-Active Course Enrollments.
      --<select name="InactiveStoreFFY" id="InactiveStoreFFY"><option value="N">No</option><option value="Y">Yes</option></select>Require Funding Flag=Y before storing inactive Grades (only valid if above option set to "Yes")
      <select name="abedreq" id="abedreq"><option value="N">No</option><option value="Y">Yes</option></select> Require Funding Flag and Status Code be set before allowing grade storage.
      --<select name="abedall" id="abedall"><option value="N">No</option><option value="Y">Yes</option></select> Require Alberta Ed coding for non-alberta ed courses as well (only valid if above option set to "Yes")
      <select name="zeropercent" id="zeropercent"><option value="Y">Yes</option>**<option value="N" selected>**No</option></select> Allow Grade Storage when percent is zero or null
      <select name="storecredit" id="storecredit"><option value="Y">Yes</option><option value="N">No</option></select> Store course credit as earned credits.
   </div>

Further Assistance

If you encounter issues or have questions, please feel free to reach out to **brianw@eics.ab.ca or david.lorenson@rdpsd.ab.ca**.