Instructions for Setting Up Initial Security

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Introduction

The Pennsylvania Department of Education maintains a group of online systems called **ePDE** that Pennsylvania schools use to report information.

Before you can use an ePDE application, your school must set up initial security under the ePDE web portal.

Setting Up Security: Overview

Setting up security involves a few steps, described in general here. Specific instructions for each step start on the next page.

- **Step 1: Identify staff members who will need ePDE security.** Decide who will control your school's security under ePDE, and who will use this ePDE application.
- **Step 2: Make sure all users have a valid e-mail address.** Security cannot be set up for any user who does not have an e-mail address.
- **Step 3: Have each security administrator and user create a User ID and password.**
- **Step 4: Send your school's security information to PDE.**

Setting Up Security: Detailed Instructions

Step 1: Identify staff members who will need ePDE security.

The ePDE Web Portal is a secure website. To gain access to an application within ePDE, you need to tell us who will be the **Security Administrator** and **Approver** for your institution.

> **Security Administrator**
> This person controls ePDE WebPortal security for your school. The administrator can update the security settings online for other users, without calling or e-mailing PDE. Ideally, there should be two administrators – a primary and a backup.
>
> **Approver**
> This person can approve other users' requests to use the web application. Your school can have more than one Approver.
>
> **Application User**
> This person uses the web application. Your school can have move than one Application User.

Larger schools may assign different people to perform each of these functions; smaller schools can assign the same person to perform all these roles.

Step 2: Make sure all users have a valid e-mail address.

Setting up a user ID in the Pennsylvania PowerPort, which is done in Step 3, requires that the person requesting an ID have a valid e-mail address. So, it's important that each person you identified in step 1 have their own e-mail address.

If any user doesn't have a valid e-mail address at school, they can use a home e-mail address, **but it should be accessible online from school.** As users attempt to set up their ID, e-mail is sent to this address confirming the ID and password.

If a user doesn't have e-mail at school *or* at home, a free e-mail account can be set up at many sites such as www.yahoo.com, gmail.google.com, or www.hotmail.com.

Step 3: Have each administrator, approver, and application user create a User ID and password.

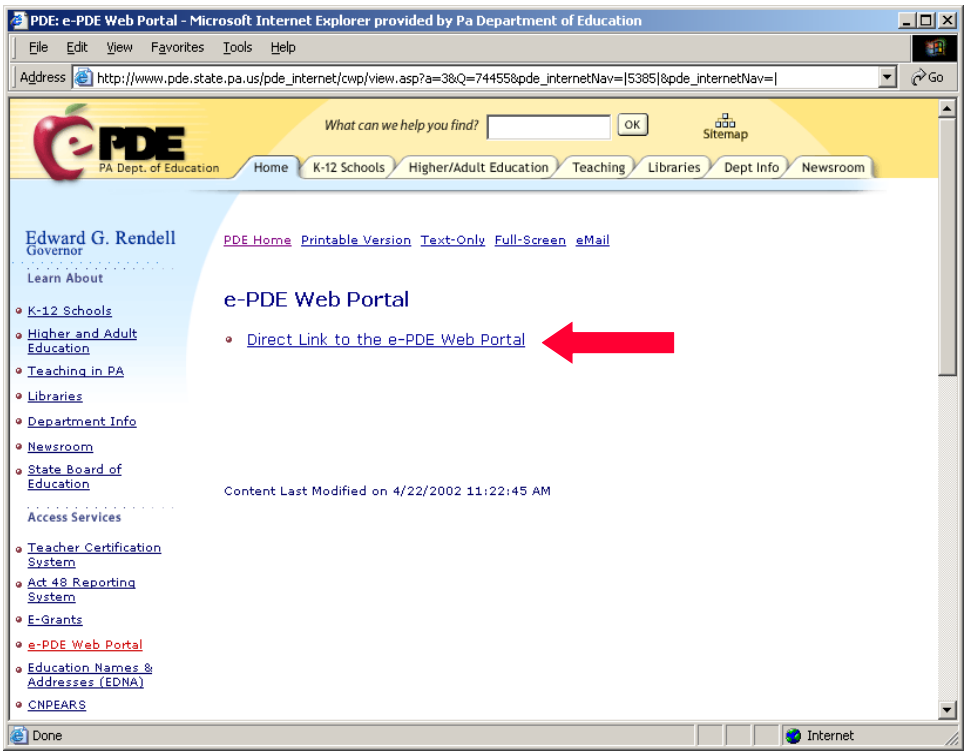
Important: Each person that you identify in step 1 <u>must</u> establish a User ID and password in the PA Powerport, using these instructions. Also, any person who will register online as a user of this application must complete this procedure.

Each administrator, approver, and application user should set up a User ID and password as follows:

Open an internet browser and go to http://www.pde.state.pa.us.

Click the *e-PDE Web Portal* link.

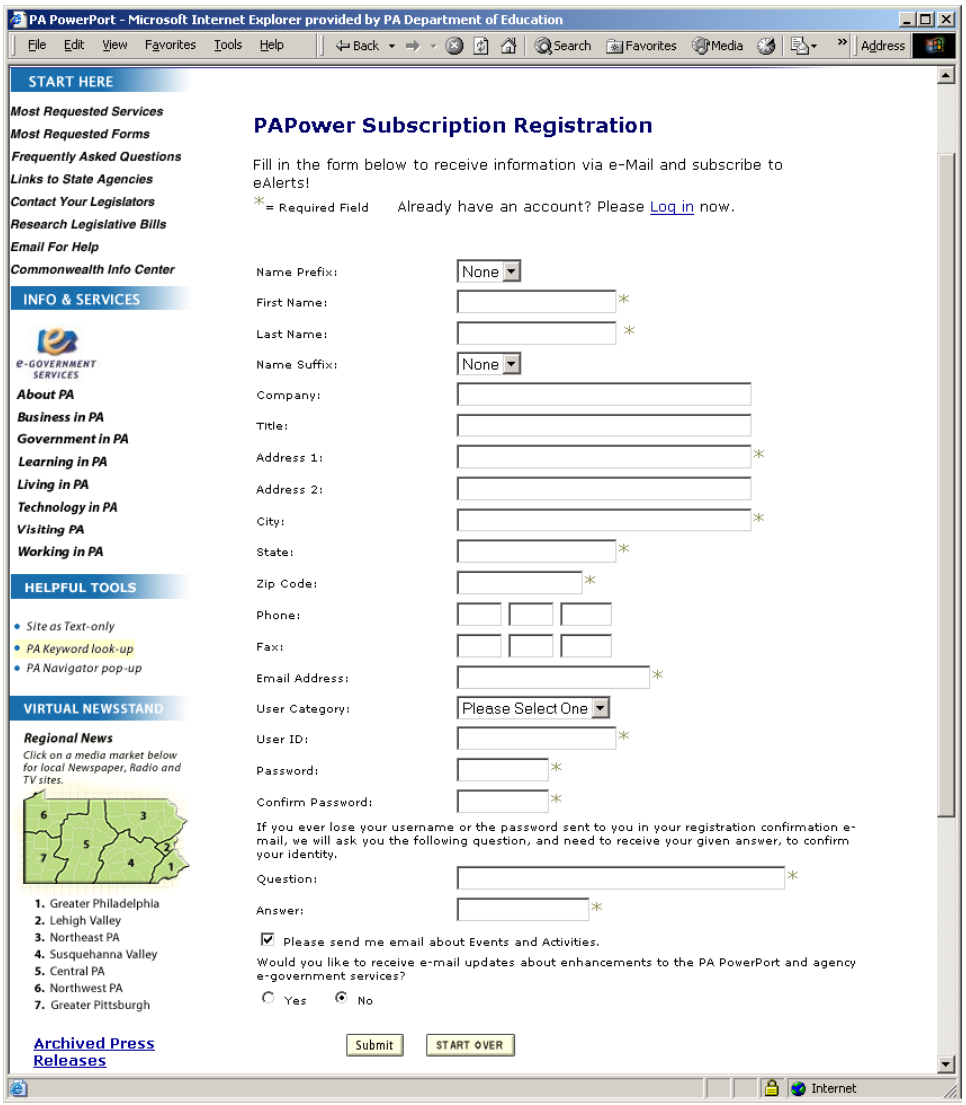
Click *Direct Link to the e-PDE Web Portal*.



Click the *Create a PA PowerPort Login* link.

Complete the required fields (marked with an asterisk) on the PAPower Subscription Registration page. Record your User ID and password in a secure place. Click *Submit*.

<u>Important</u>: After each person has set up their User ID in the PA PowerPort, they should give their User ID, *along with the e-mail address they used to create the User ID*, to the person who will submit the information to PDE in the next step.



Step 4: Send your school's security information to PDE.

Create a Microsoft Excel spreadsheet listing the information on the security administrators, approvers, and users, using the instructions below. If Microsoft Excel is not available at your school, you can also use Microsoft Works or Lotus 1-2-3 to create the spreadsheet file.

1. **Leave rows 1 to 4 blank. Starting on row 5, the spreadsheet should list 6 columns of security information for each user.**

2. **Enter the following information on a separate row (starting with row 5) for each administrator, approver, and user.** ***Do not add a user to the spreadsheet until they have completed the procedure in Step 3 to set up a User ID and password.***

   Column 1: Enter the Administrative Unit Number (AUN) of your school.
   Column 2: Enter the administrator's, approver's, or user's given name.
   Column 3: Enter the user's <u>PA Powerport User ID</u> that was created in Step 3.
   Column 4: Enter the security role requested for the User:
   Enter **Primary** or **Backup** for the security administrators.
   Enter **Approver** for the application approver.
   Enter **Provider** for application user.

Column 5: Leave blank for the Primary and Backup Security Administrators. Enter the application acronym (PERMS) for the Approver and the application user.
Column 6: Leave this column blank.
Column 7: Enter the e-mail address the user entered when setting up the PA Powerport User ID as in Step 3.

Spreadsheet examples:

Here is an example of a completed spreadsheet, listing administrators and an approver for the PERMS application. Note that this school is assigning different individuals to each role, and is designating a separate Backup administrator:

123456789	Sara Smith	ssmith	Primary			ssmith@msn.com
123456789	Brenda Clark	bclark	Backup			bclark@msn.com
123456789	Bill Smith	bsmith	Approver	PERMS		williamsmith@yahoo.com
123456789	Joe Jones	jjones	Provider	PERMS		joejones@yahoo.com

Here is an example of what the spreadsheet should look like if only one person will be assigned the security:

123456789	Sara Smith	ssmith	Primary			ssmith@msn.com
123456789	Sara Smith	ssmith	Approver	PERMS		ssmith@msn.com
123456789	Sara Smith	ssmith	Provider	PERMS		ssmith@msn.com

3. **Save the spreadsheet on your PC's hard drive, using the filename "EPDE_" plus your school's nine-digit AUN (the same one you listed in the spreadsheet for each user).**

   Example: The spreadsheet shown in the samples above would be saved with the filename:

   EPDE_123456789

4. **E-mail the spreadsheet file (as an attachment) to PDE at ra-pdetech@state.pa.us.**

   In the subject line of the e-mail, enter "**ePDE Security AUN "** followed by your school's AUN. Example: "**ePDE Security AUN 123456789**".

   In the body of the e-mail, include **your name, your school's name, and your telephone number**.

   With most e-mail software, after you attach the spreadsheet file to the e-mail, a line will appear in the e-mail heading (along with the From, To, and Subject information) that indicates what file is attached.

A completed e-mail example:

```
From:       ssmith@blueschl.k12.pa.us
To:         ra-pdetech@state.pa.us
Subject:    ePDE Security AUN 123456789

<Attached: C:\My Documents\ePDE_123456789.xls>

Sara B. Smith
Blue Mountain School
717-555-1212
```

That's it! You'll receive an e-mail from us when your spreadsheet has been processed and security has been established for your school. This process may take anywhere from several days to two weeks.

Updating Your School's ePDE Security

Each school will submit a basic security spreadsheet to the PDE once. When your school's basic security is set up, changes can be made online by following the instructions on the ePDE Web Portal site.

- Additional users can request permission to use an ePDE application online, and the Approver for that application can approve those registration requests online.

- Primary or backup Security Administrators can perform administrative functions online, including deleting outdated users, and changing designated application approvers.

These tools enable you to update your ePDE security without contacting PDE.

ePDE Web Portal Help Desk

If you have questions or problems, or if you don't receive notification that your security has been established within two weeks, please contact the ePDE Web Portal Help Desk:

E-mail: **ra-egrantshelp@state.pa.us**
Telephone: **717-783-6686**

Be sure to include your name, your school's name, and your telephone number in any email, so our technical support staff can call you if needed.