

Clever School Signup: PowerSchool

1. Introduction

Clever allows the students, teachers, schools, and class rosters in PowerSchool to automatically sync with the applications you authorize. This eliminates the need for manual CSV transfers or complicated SFTP uploads. Clever's integration with PowerSchool is **read-- only** -- it will never modify your district's data.

To allow the data sync to happen, Clever needs to be able to access a school's PowerSchool installation with permissions to export data via Direct Database Export (DDE) only.

The best practice when using Clever is to create a new PowerSchool account ("Clever Sync") that has **read-- only access** and DDE export permissions. This document walks you through that process, which takes around 10 minutes to complete.

For each step we provide two ways to access a specific page in PowerSchool — navigation through menu selections and URL extension. You can access the same page by either: navigating through the menu choices indicated or by appending the URL extension to the base PowerSchool URL in your web browser. (Example: <https://basePowerSchoolURL.com/URLextension>).

Note: *If you are using a version of PowerSchool that is older than v7.8, this document may not match your permissions screen. Please submit a [help request](#) so we can walk you through this process.*

2. Create a “Read-- Only Export” Security Group

PowerSchool permissions (i.e. ability to view/edit data) are set through security groups.

The first step in this process is to create a custom security group for Clever, that has only the “Read-□Only Export” permissions for the sync to take place.¹

To start, identify an unused, **view-- only**, security group to customize (**Group 12** in this example).

Group Number	Group Name	Access Level	Report Queue Priority
1	Unassigned	No Access	0
2	Admin	View & Modify	0
3	Counselors	View & Modify	0
4	Registrar	View & Modify	0
5	Nurse	View & Modify	0
6	Resource Officer	View Only	0
7	Teachers	View & Modify	0
8	View Only	View & Modify	0
9	Administrator	View & Modify	0
10	Principal	View & Modify	0
11	SPED Teachers	View Only	0
12	Group 12	View Only	
13	Group 13	View Only	

¹ This step is required because all of the built-in PowerSchool security groups (i.e. **Administrator (9)**) give too many or too few permissions.

Next, rename the group (i.e. “Read-Only Export”) and ensure that permissions match the example below. Clever should not have access to *any* Discipline, Health, Counselor, or Attendance records, and should not be able to access PowerScheduler. Make sure to click the **Submit** button to save your changes.

Note, disabling Clever access to “Accessible Student Screens” (not pictured), may impair Clever’s ability to load email addresses for your students. Please [contact us](#) if you are experiencing issues loading student email addresses.

Option	Value
Group Number	12
Group Name	<input type="text" value="Read-Only Export"/>
Access Level	<input type="text" value="View Only"/>
Page Level Permissions	Overridden Page Permissions
Can Modify Schedules	<input type="text" value="No, not at all"/>
PowerScheduler Access	<input type="checkbox"/>
Language Translator	<input type="checkbox"/>
Report Queue Priority	<input type="text" value="0 Highest"/>
Accessible Log Types	<input type="checkbox"/> Discipline <input type="checkbox"/> Health <input type="checkbox"/> Counselor <input type="checkbox"/> Attendance <input type="checkbox"/> Parent Contract <input type="checkbox"/> Grade Change <input type="button" value="Check All"/> <input type="button" value="Uncheck All"/>
Accessible Incident Types	
Health and Immunization	Certification <input type="text" value="No Access"/> Immunization <input type="text" value="No Access"/> Office Visit <input type="text" value="No Access"/> Screening <input type="text" value="No Access"/>

3. Grant Page-- Level Permissions to “DDE”

The data export function that Clever uses is a PowerSchool read-only export called “DDE.” Clever requires additional permissions beyond read-only on the DDE pages so that the sync tool can create queries and run exports. This permission **does not** allow Clever to modify any data in PowerSchool.

A. Enable Access to Page Permissions

Navigate to: Start Page > System Administrator > Security > **Access to Page Permissions** (/admin/security/changepageaccesspriv.html)

Turn Modify Permissions to **On** and **Submit**.

Access to Page Permissions

Turn modify permissions On Off

B. Enable Access to DDE Page #1

Navigate to: Start Page > System Administrator > Page and Data Management > **Direct Database Export (DDE)** (/admin/tech/dde/home.html)

Click the **Modify access privileges for this page** link at the bottom of the page

[Modify access privileges for this page](#)

Set the permissions for the security group you created in the previous step to **Full**. This allows Clever to create a new export.

11 SPED Teachers	<input type="radio"/> Group default	<input checked="" type="radio"/> None	<input type="radio"/> View-only	<input type="radio"/> Full
12 Read-Only Export	<input type="radio"/> Group default	<input type="radio"/> None	<input type="radio"/> View-only	<input checked="" type="radio"/> Full
13 Group 13	<input type="radio"/> Group default	<input checked="" type="radio"/> None	<input type="radio"/> View-only	<input type="radio"/> Full

Submit your changes

C. Enable Access to DDE Page #2

Navigate to: Start Page > System Administrator > Page and Data Management > Direct Database Export (DDE) > (select records) **Export** (/admin/tech/dde/exportrecords.html)

Click the **Modify access privileges for this page** link at the bottom of the page

[Modify access privileges for this page](#)

Set the permissions for the security group you created in the previous step to **Full**. This allows Clever to create a new export.

11 SPED Teachers	<input type="radio"/> Group default	<input checked="" type="radio"/> None	<input type="radio"/> View-only	<input type="radio"/> Full
12 Read-Only Export	<input type="radio"/> Group default	<input type="radio"/> None	<input type="radio"/> View-only	<input checked="" type="radio"/> Full
13 Group 13	<input type="radio"/> Group default	<input checked="" type="radio"/> None	<input type="radio"/> View-only	<input type="radio"/> Full

Submit your changes

4. Create a Sync Account

A. Create a New Staff Account

Navigate to: Start Page > Staff > **New Staff Member** (/admin/faculty/new.html)

Create a new Staff record for your Clever Sync Account. Make sure the name (last, first) you choose clearly identifies the user as the Clever Sync account and provide the user with a unique ID. Click **Submit**.

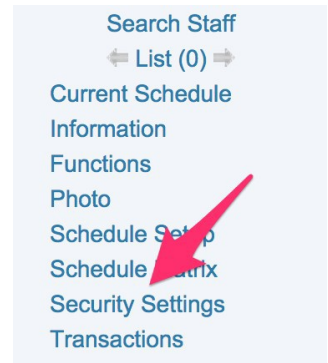
New Staff Member

Name (Last, First MI)	Sync *	Clever *	
Preferred Name	<input type="text"/>		
Email Address	<input type="text"/>		
Title	<input type="text"/>		
Gender	<input type="text"/>		
Ethnicity	<input type="text"/>		
ID	99999 *		
Homeroom	<input type="text"/>		
School	District Office		
Lunch ID	<input type="text"/>		
Home Phone #	<input type="text"/>		
School Phone #	<input type="text"/>		
Street	<input type="text"/>		
City, State, Zip	<input type="text"/>	<input type="text"/>	<input type="text"/>
SSN	<input type="text"/>		
DOB	<input type="text"/>	<input type="text"/> (MM/DD/YYYY)	
Staff Type	<input type="text"/>		

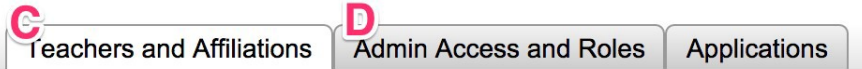
Submit

B. Navigate to User Security Settings

The next step is to adjust the security settings for the Clever Sync user you created, so the user is assigned to the “Read-Only Export” group you previously created. You will review the settings on each tab.



Search Staff
List (0)
Current Schedule
Information
Functions
Photo
Schedule Setup
Schedule Matrix
Security Settings
Transactions



Teachers and Affiliations Admin Access and Roles Applications

C. Teachers and Affiliations

Make sure the Clever User is connected to the District Office:

Home School	Active	School	Staff Type	Actions
<input type="radio"/>	<input checked="" type="checkbox"/>	District Office	Staff	

D. Admin Access and Roles

I. Enable to Sign in to Administrative Portion of PowerSchool

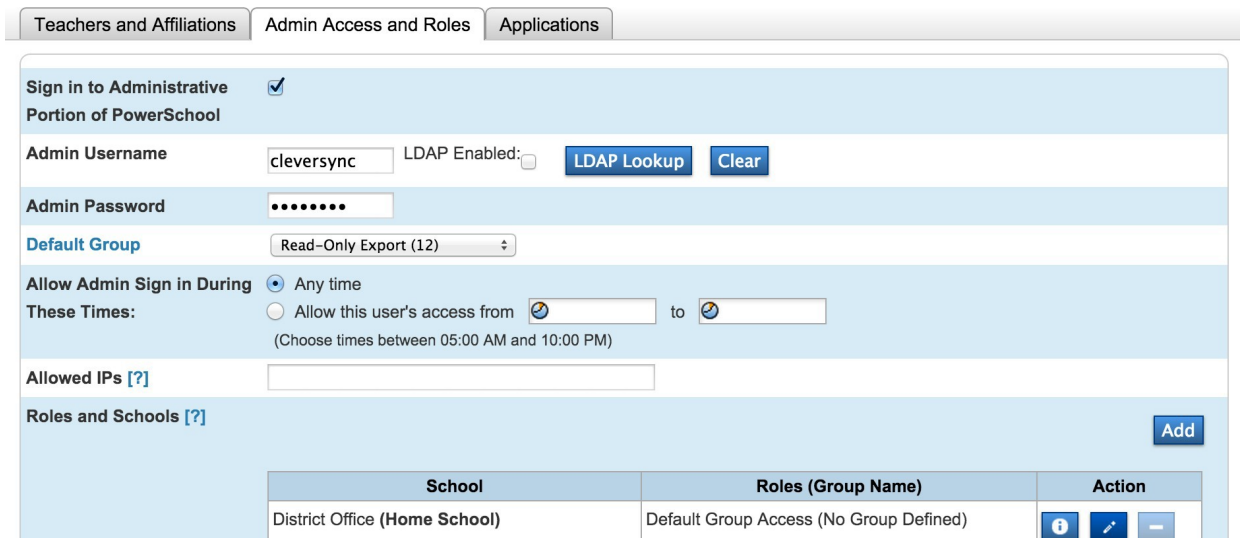
II. Assign the Clever Sync user a username (i.e. cleversync)

III. Assign the Clever Sync user a secure password (recommended: at least 8 characters, randomly generated)

Note: Please make note of these credentials -- you'll need them when you complete the Clever sign up

IV. Set the Default Group to the “Read-Only Export” group you created earlier.

V. Ensure access to the “District Office” school with “Default Group Access” and Submit



Teachers and Affiliations Admin Access and Roles Applications

Sign in to Administrative Portion of PowerSchool

Admin Username: cleversync LDAP Enabled: [LDAP Lookup](#) [Clear](#)

Admin Password:

Default Group: Read-Only Export (12)

Allow Admin Sign in During These Times: Any time
 Allow this user's access from to
(Choose times between 05:00 AM and 10:00 PM)

Allowed IPs [?]:

Roles and Schools [?] [Add](#)

School	Roles (Group Name)	Action
District Office (Home School)	Default Group Access (No Group Defined)	

5. Removing a Clever Account

Should you ever need to remove Clever's data sync, the cleanup steps are simple.

- A. Search for the Clever Sync user you created on signup



- B. Delete the Clever user

6. Clever Support

If you have any questions about setting up your Clever sync, visit our [Help Center](#)!