PowerSchool

Processes and Walkthroughs

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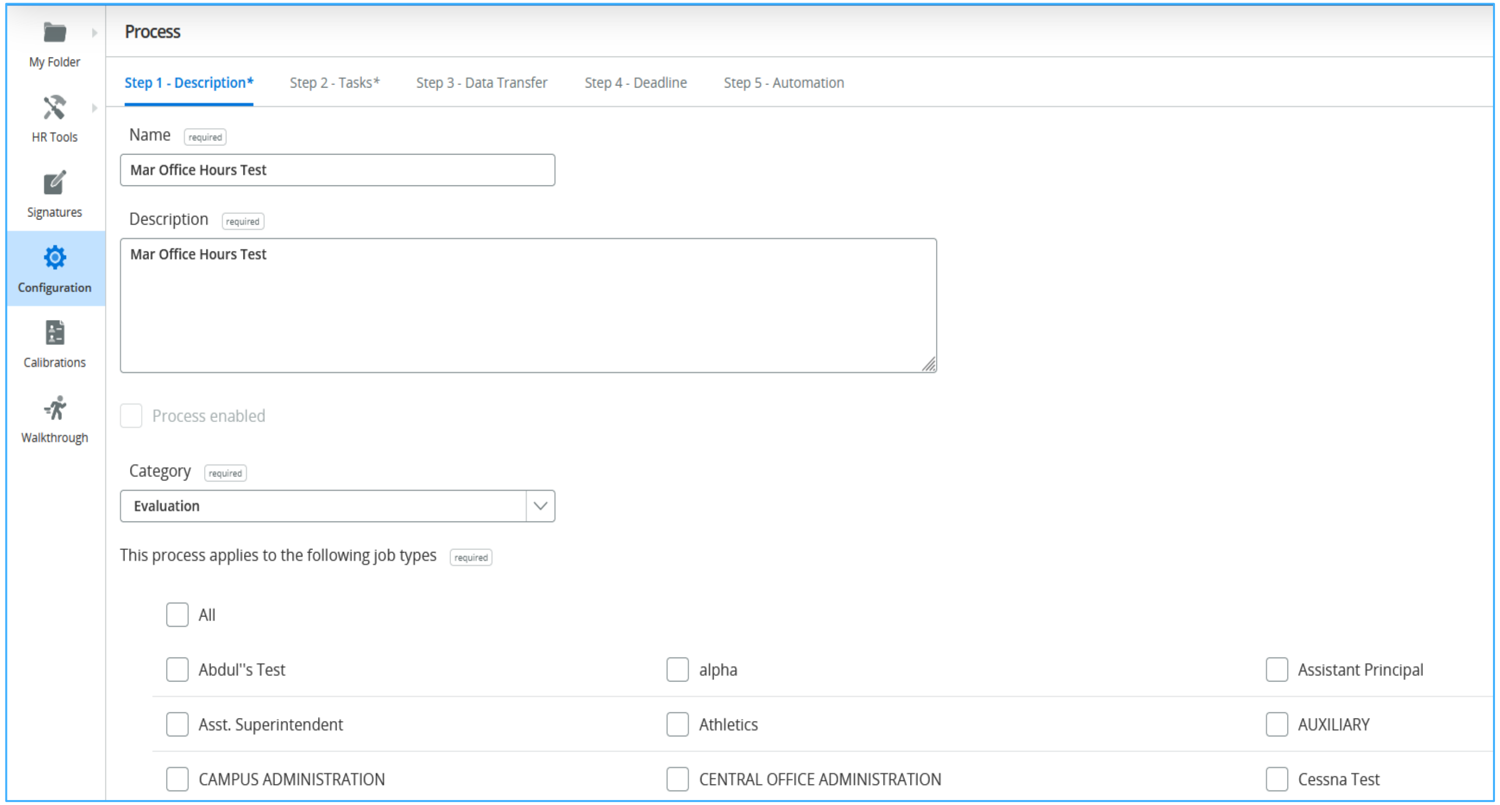
Creating a Process

- Before beginning process creation, please be sure that you have created all the forms you would like to use under Configuration > Custom Forms. These will be the tasks for your process.
- Navigate to Configuration > Setup Processes
- At the bottom right corner of the page, select the "Add" button.

Step 1- Description

- On the Description tab, enter a Name and Description for your new process, then select the category (evaluation, action plan, etc.).
- Beneath the phrase “This process applies to the following job types,” check the boxes beside all of the job types that this process will be used to evaluate.
- At the bottom of the page, there are some optional settings. You can select whether or not you’d like to allow for tasks in this process to be delegated to other users. You can also choose to make it a multi-year process or enable advanced scripting.
- In the Rubric drop down menu, you can also choose to associate your process with a rubric.



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Step 2: Tasks

- To add tasks to your process, locate the task on the left side of the screen and then select the plus sign beside it. Once it's been successfully added, you will see it listed as part of the process on the right side.
- To do and meeting tasks can be added without selecting a form as they are not associated with a particular document.
- The Form Category drop-down menu and the Search bar can be used to filter by form types or search for a particular form title.

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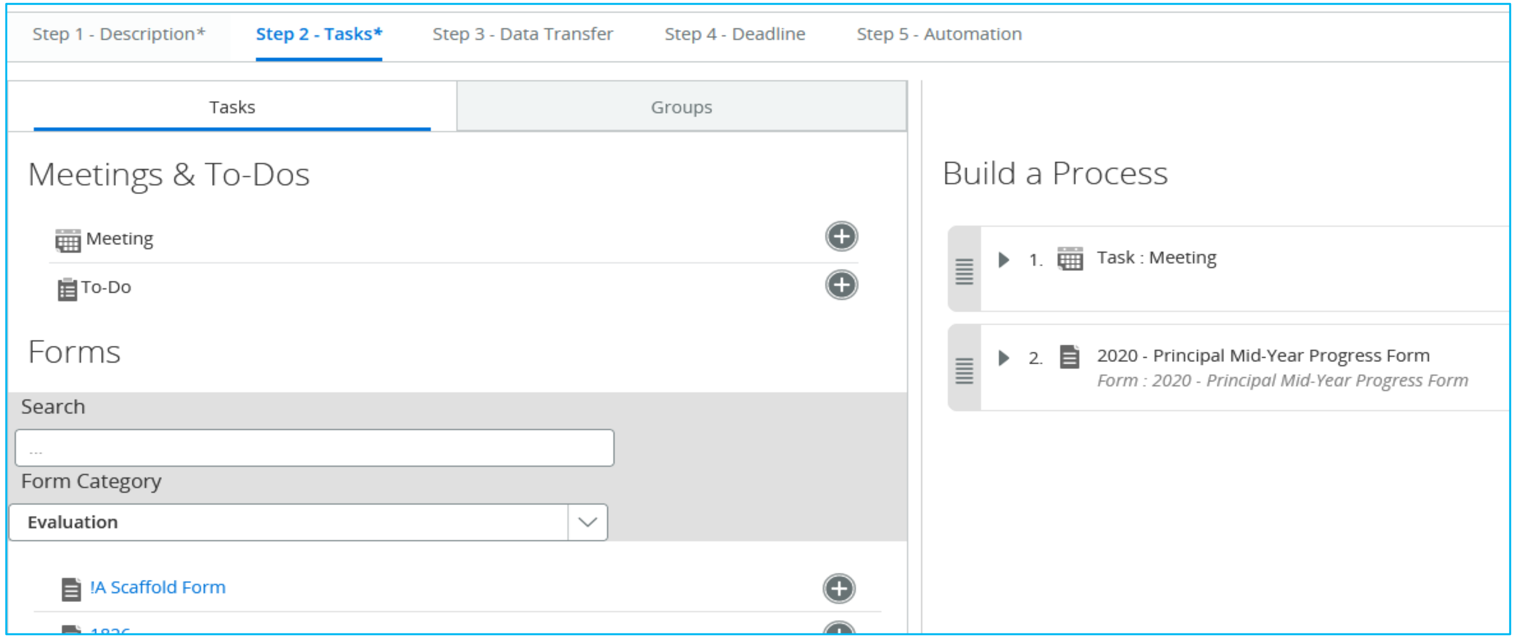

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Form Settings

- To configure the settings for individual forms, select the "…" symbol beside the task name and the choose the "Edit" option.
- Multiple settings can be configured on this page, including:
  - ➢ Display Title
  - ➢ Person Responsible
  - ➢ Required Step
  - ➢ Prerequisite Steps
  - ➢ Workflow
  - ➢ Step Due Date (under Show Scheduling)
  - ➢ Form Selection Options (under Advanced)

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Person Responsible vs Workflow

- Person responsible refers to the user that the form initially goes to when the process is assigned. This is the person responsible for filling out the form.
- The workflow comes into play after the form has been initially submitted, when save final is chosen.

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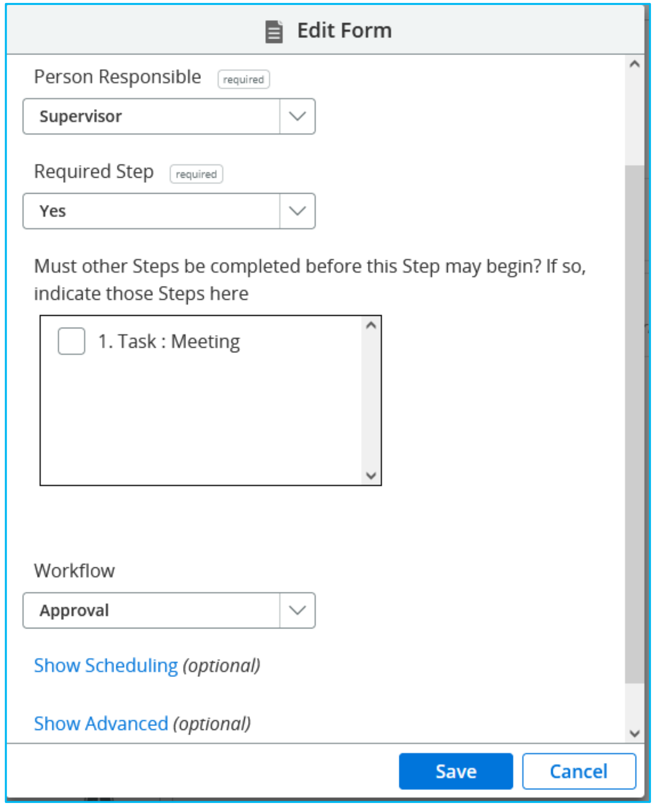

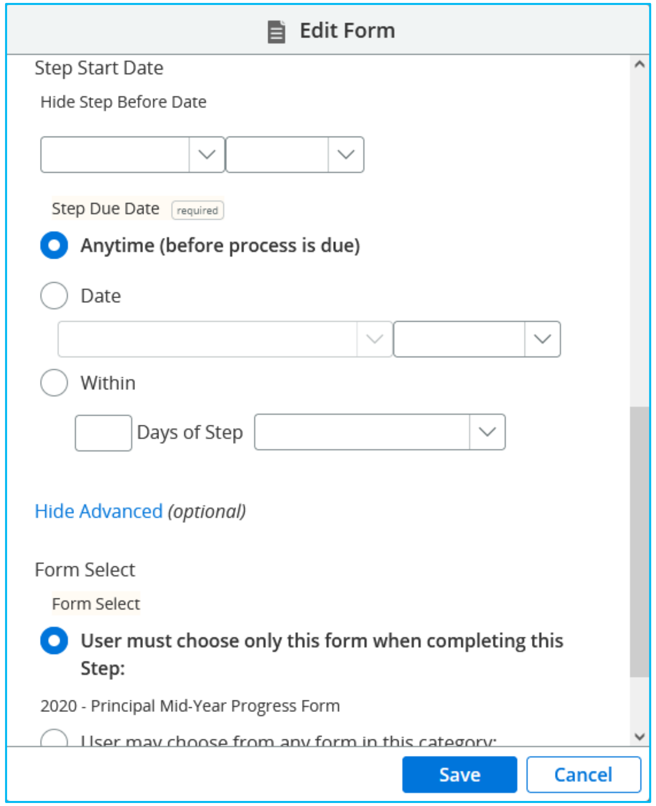

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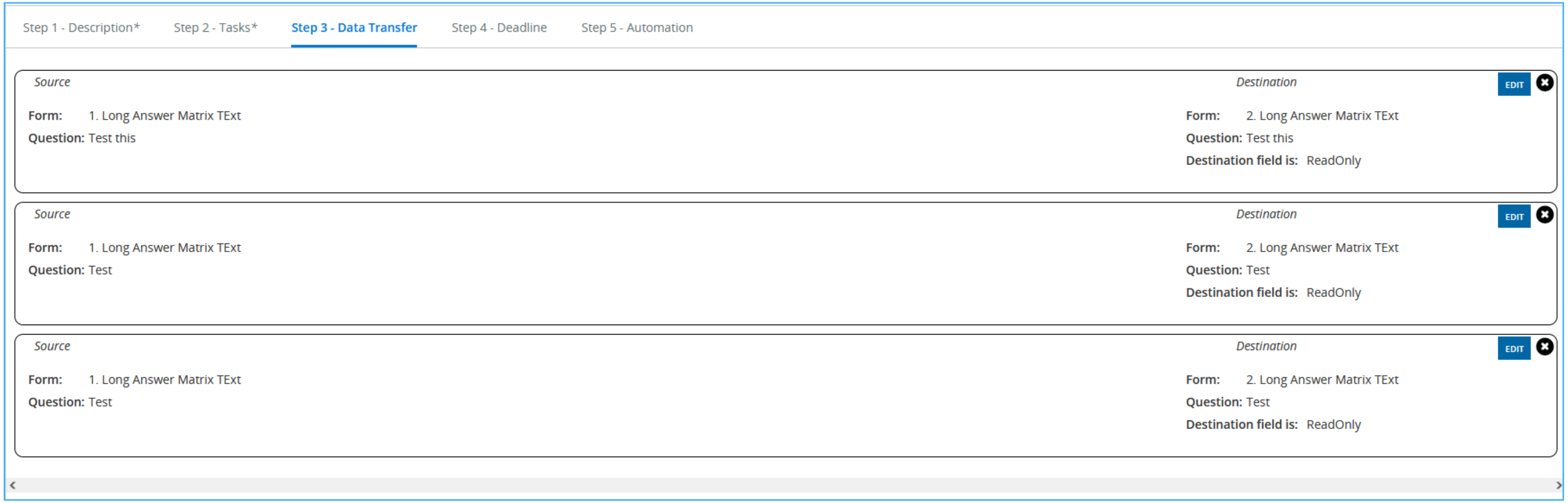
Step 3- Data Transfer

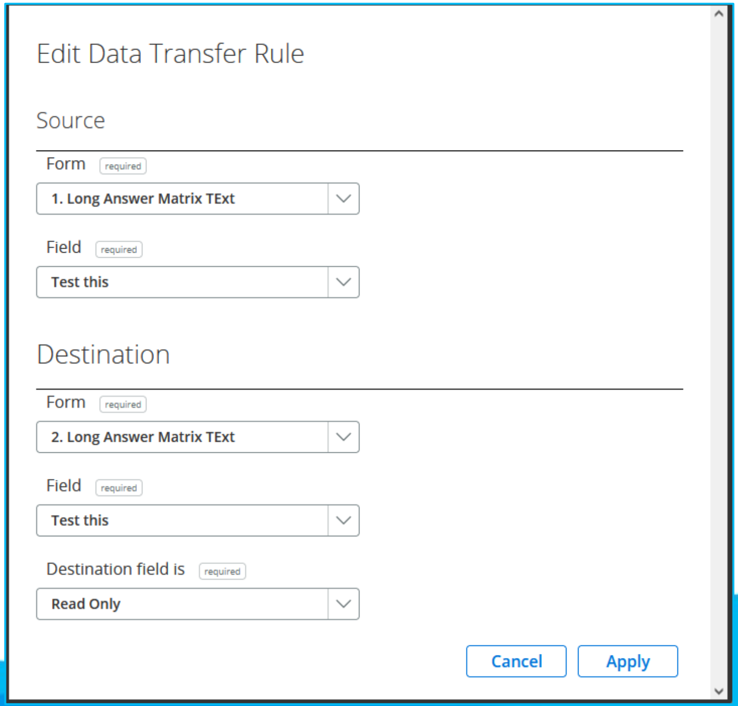
- Data Transfers allow for an answer field to be automatically populated from one form (the source form) to another (the destination form).
- On the left side, the title and question field for each source form show. To the right, the corresponding destination form titles and questions are shown.
- Destination form fields can be made editable or not, at the district’s discretion.

Data Transfer Notes

- The source form must be fully completed before the data will transfer to the destination form.
- Source forms should not be altered after a process has been started and data has been transferred.
- If you need to change the data in the destination field after this has started, you can make the field editable and have users enter the change manually.
- The source and destination questions must have the same text type, either both rich text or plain text.



Important Note: The question types used for the Source and Destination form fields must match in order to transfer successfully. For example, a Short Answer question field in the source form must transfer to a Short Answer question field only in the destination form.



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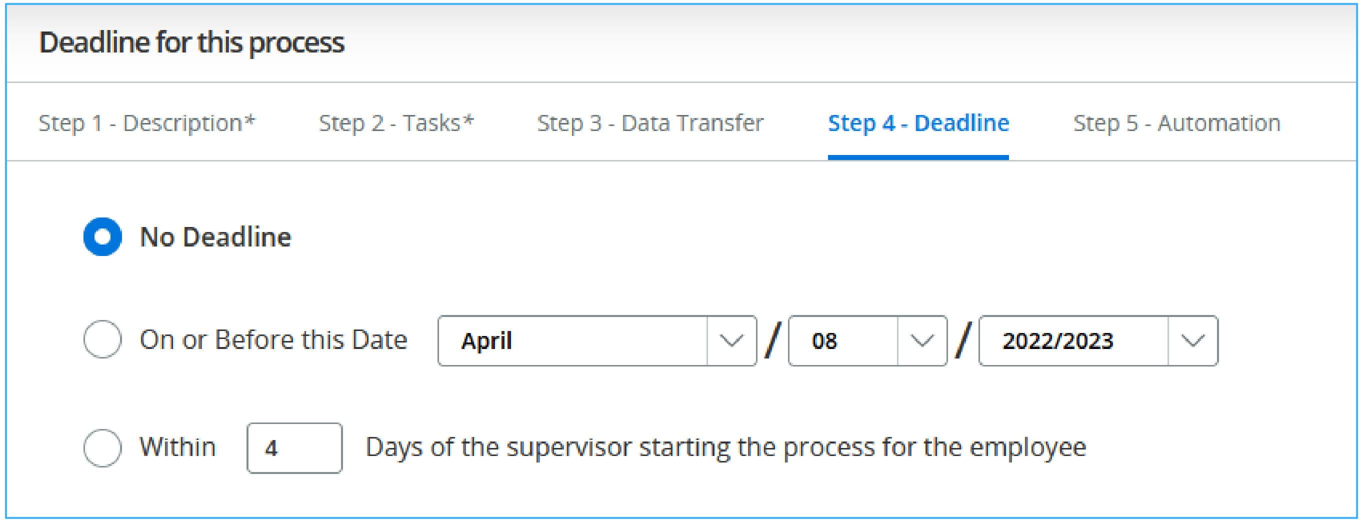
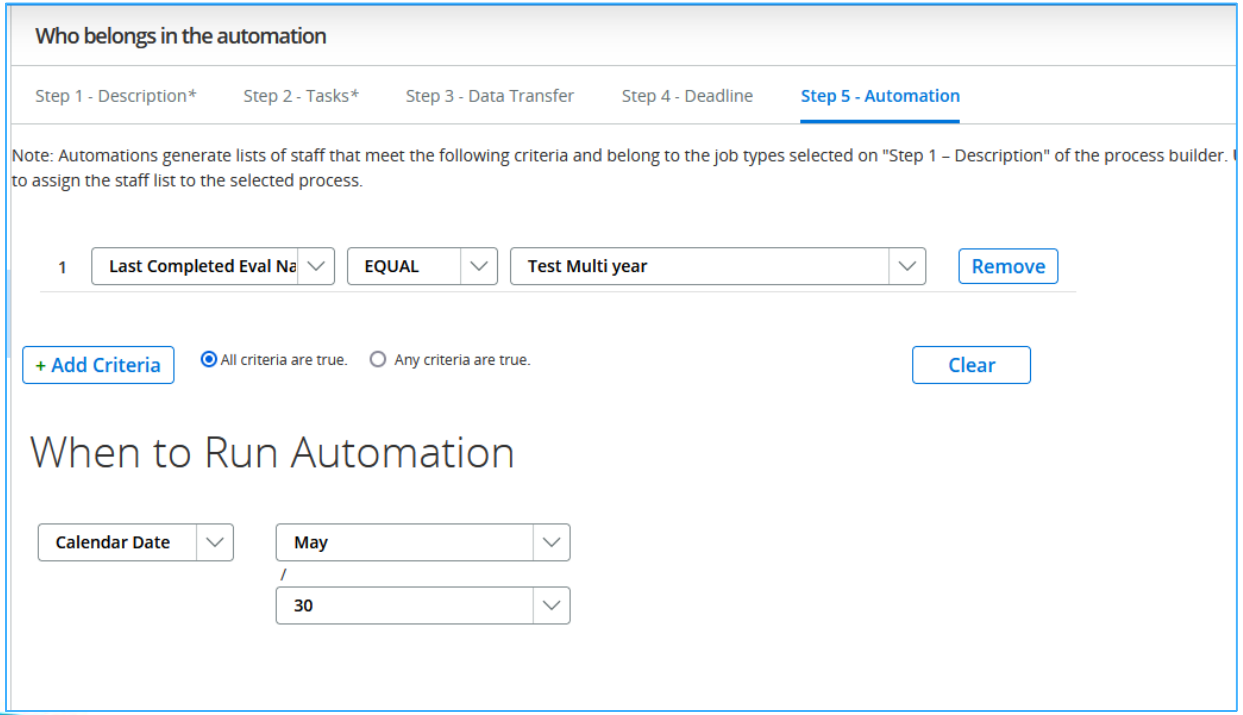
Step 4- Deadline

- On the Deadline page, there are three options:
  - ➢ No Deadline
  - ➢ On or Before this Date
  - ➢ With __ Days of the Supervisor Starting the Process for the Employee



Step 5- Automation

- Automations use specified criteria to prep the next year's processes for assignment
- To add a new automation, select "Add" in the bottom right corner, then select "Add Criteria." You would then enter the criteria you'd like to assign the process based on.
- For example, you could choose to have this process assigned to all employees based off the title of their last completed evaluation process. You can also select a date for the automation to run.



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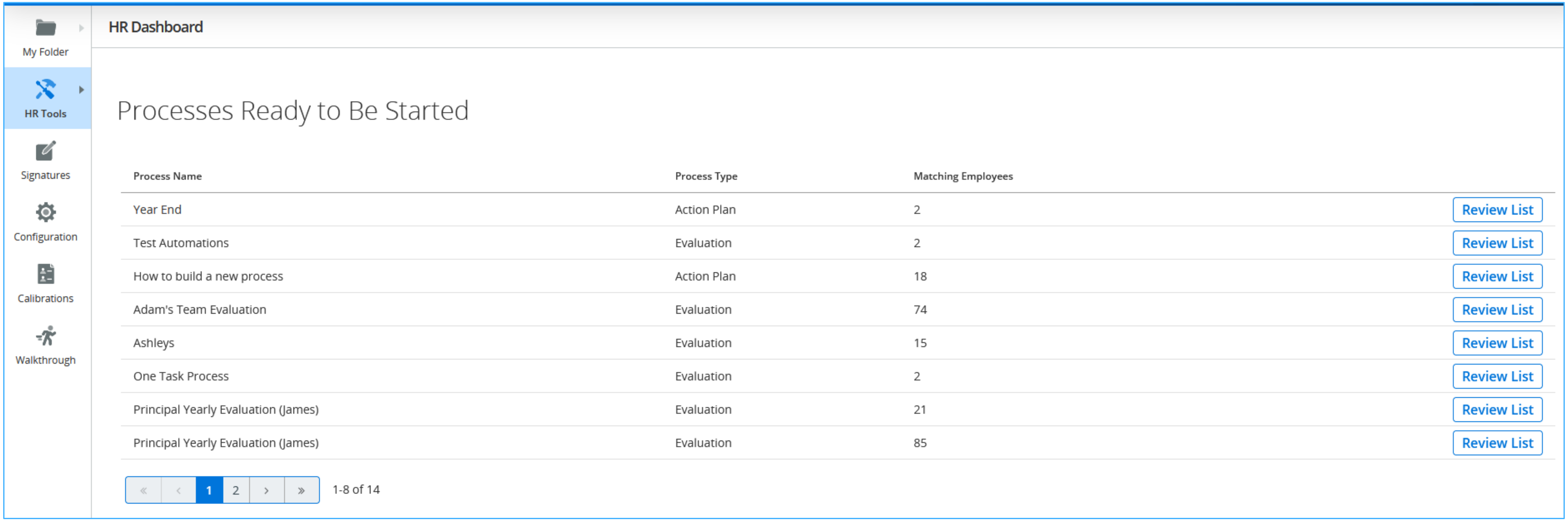
Important Note: Automations do not automatically assign out processes, they only prepare them to be bulk assigned. To review and assign the processes prepared by your automation after it has run, navigate to HR Tools>Dashboard. All processes pending assignment will be ready for review under "Processes Ready to Be Started."



Processes Ready to Be Started

Process Name	Process Type	Matching Employees	
Year End	Action Plan	2	Review List
Test Automations	Evaluation	2	Review List
How to build a new process	Action Plan	18	Review List
Adam's Team Evaluation	Evaluation	74	Review List
Ashleys	Evaluation	15	Review List
One Task Process	Evaluation	2	Review List
Principal Yearly Evaluation (James)	Evaluation	21	Review List
Principal Yearly Evaluation (James)	Evaluation	85	Review List

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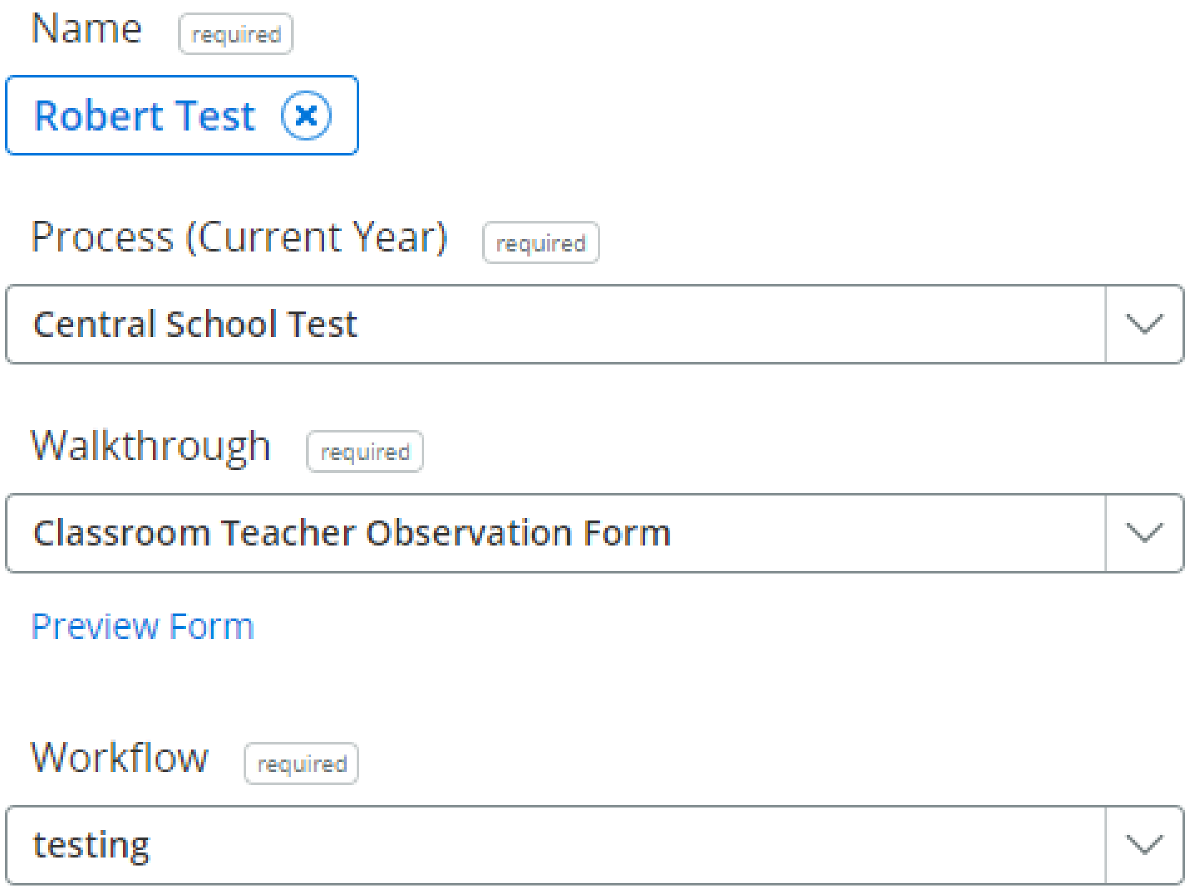
Walkthroughs

- Walkthroughs are forms that can be attached to a staff's active process. The difference between a walkthrough and a standard task is that walkthroughs can be attached to a staff's individual evaluation rather than all staff that are currently assigned the same evaluation.
- Walkthroughs can be created under Configuration -> Custom Forms. You would click on the Walkthrough tab and then click 'New Form'.
- You are also able to create a workflow specifically designed for walkthroughs under Configuration -> Workflow. You would need to make sure that 'Walkthrough' is selected under the Type dropdown when adding the new workflow.

Adding a Walkthrough to a Process

- To add a walkthrough to a process, you will click on Walkthrough (Left side of the screen)
- From here, you will select the staff, their active process, the walkthrough, and the workflow from each respective dropdown.
- You will then click Start when finished.

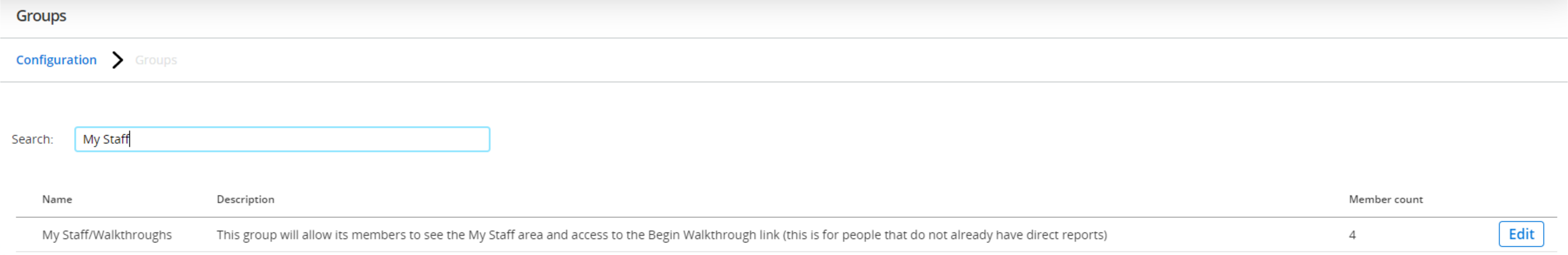


Granting walkthrough access to users without direct reports

If a user has a direct report, they will have access to the Walkthrough feature. Users without direct reports in the Staff security group will not have this feature available. If you need to give your users without direct reports the ability to initiate a walkthrough, you can do so via the following steps:

- Go to Configure > Setup Groups.
- Look for the "My Staff / Walkthroughs" group and choose Edit.
- Click Add to begin adding users to the group.
- Once you have added the users, click Save.

Users in this group will now have access to the MyStaff tab and will also be able to initiate Walkthroughs.



Questions?

Helpful Community Articles:

- https://help.powerschool.com/t5/Perform-Knowledge-Base/Perform-How-Do-I-Add-a-Task-to-a-Process/ta-p/26481
- https://help.powerschool.com/t5/Perform-Knowledge-Base/Perform-Where-do-I-add-a-workflow-to-a-task-within-a-process/ta-p/26547
- https://help.powerschool.com/t5/Perform-Knowledge-Base/Perform-How-do-I-add-data-transfers-into-my-process/ta-p/26484
- https://help.powerschool.com/t5/Perform-Knowledge-Base/Perform-How-do-I-set-up-an-automation-for-the-same-process-to/ta-p/26512