Workspace Configuration

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Agenda

1	What is Workspace Configuration and Why would you want to customize it?
2	How to Configure your Workspaces using Self-Service
3	General Overview (Rules, Tags, Permissions, Approval Criteria, Views, Student Records Views etc)
4	Workbook Revisions
5	Resources
6	Q&A
7	Upcoming Events & Webinars

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Workspace Configuration

What is it? And Why Configure your Workspaces?

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Workspace Configuration

Views

Student Record Views

Per-mission

WHAT IS IT?

Tags

Approval Criteria

Rules
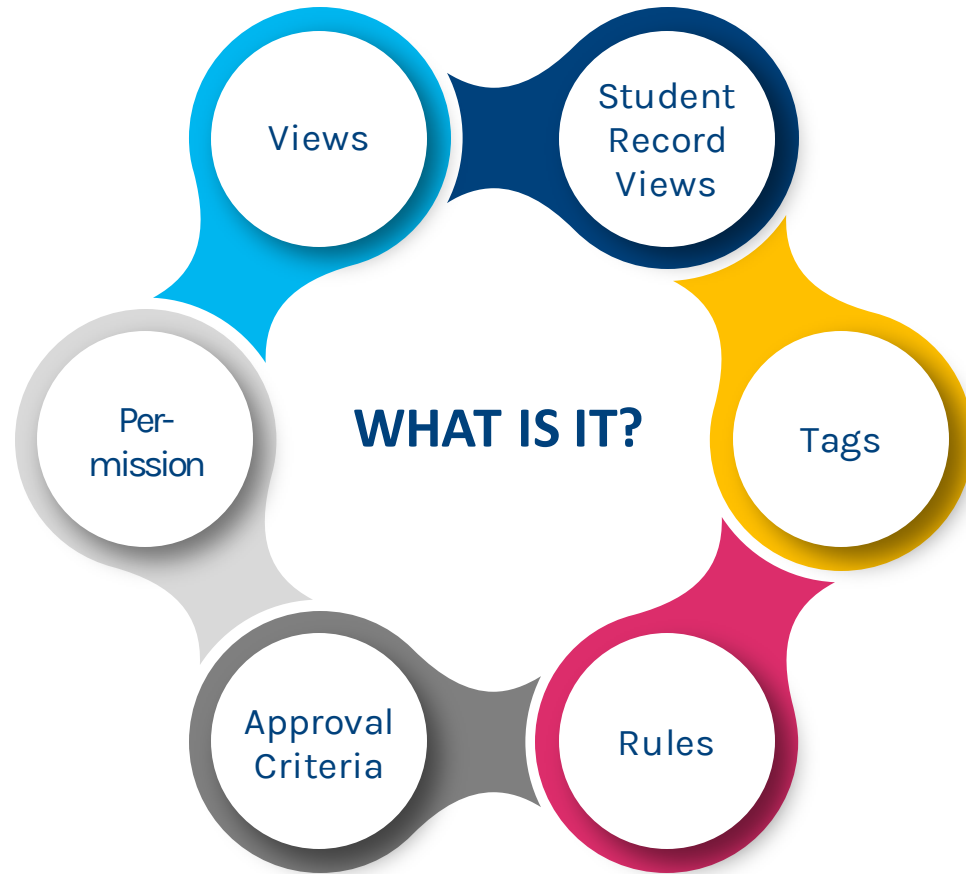
WHY CONFIGURE?

- Save Time
- Customize for your process
- Help Ensure Record Accuracy
- Less Manual Fixes

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How You Can Configure Your Workspaces Using Self-Service

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Views

Default & Custom

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Default Views Available to you

Pre-Submission (Restricted Form)	Roster (Private Form)	Submission (All)
• In-Progress	• All Roster Records • Unsubmitted • Imported/Added • Notified/Not Started • Started • Submitted • On Hold • Discarded	• Pending Approval • Approved • Pending Delivery • Delivered • All Submissions • Discarded

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What can you do with a custom view

Columns

Rules

Delete

Export Fields

Permissions
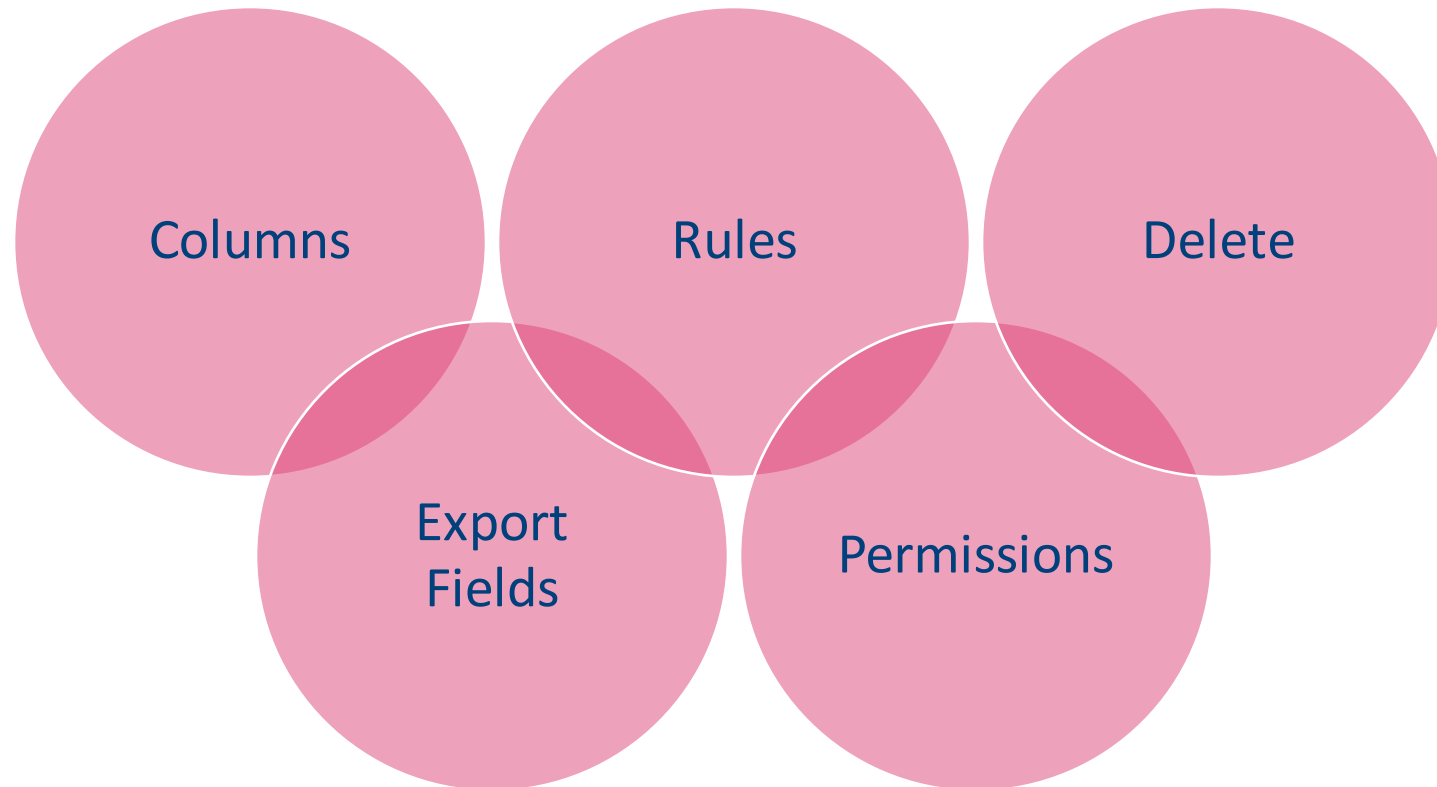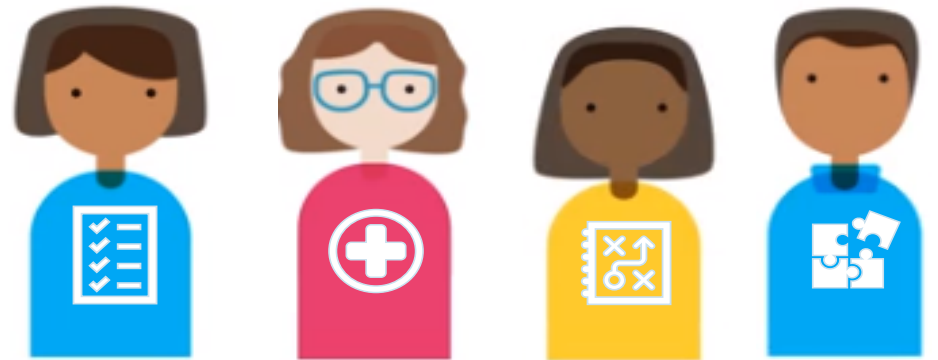
Student Record Views

Student Record Views

Custom Detail View

Relevant Data

Appropriate Staff

Roster and Submission Workspace

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⭐ Tags

What is a Tag?

Simple labels applied to records in the roster and submission workspace

Types of Tags

Manual Tags

Automatic Tags

Donald Duck (Submission)

← Back to New Student Registration (2022)

Record 1 of 3 | All Fields | Nurses

Field Name	New Value
stu_FirstName	Donald
stu_MiddleName	
stu_NoMiddleName	Yes
stu_LastName	Duck
stu_Gender	Female
stu_Grade	9
stu_School	School A
stu_Phone	333-333-3333
stu_BirthCert	88cca8e2-74bc-42fe-ad56-347a08958c0f||Revision 1.JPG
stu_ProofVacc	

Tags

You may assign or remove tags for this record here. Changes are automatically saved.

☐ *Administrative Follow-up*
☐ *Polished*
☐ *Printed*

Tasks

Polish Data
Discard Record
Print Forms

Language

English

Approve

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How can Tags be used?

Label based on record info

Admin Tasks

Approval Criteria

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Rules

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What are Rules?

Set of Criteria used in various ways

Filters   Permissions   Tags
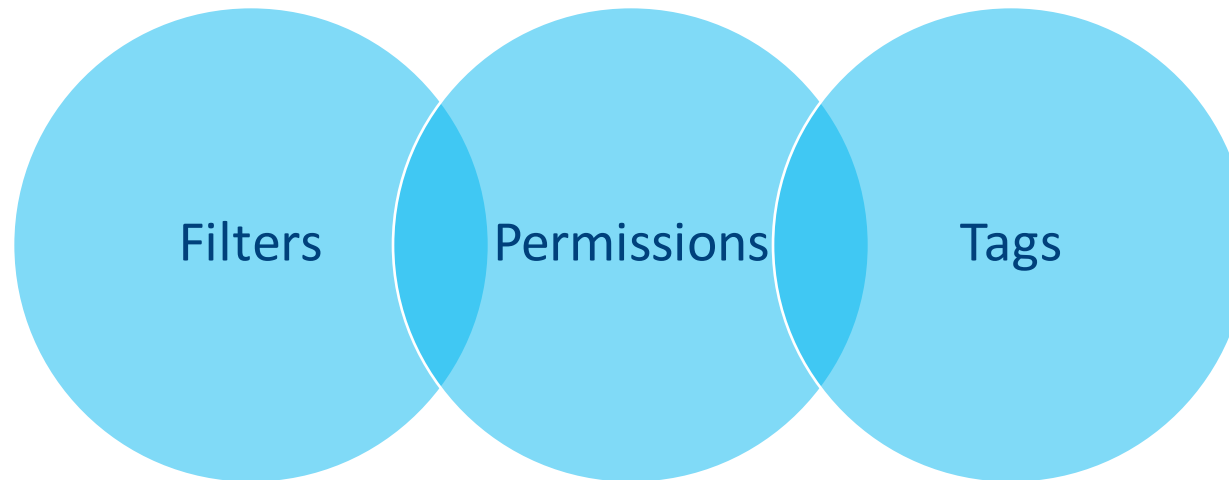
How can Filters be used?

Schools Grades SPED Transportation Medical Agreements

Approval Criteria

What is Approval Criteria?

Mechanism that allows/disallows submission records from being approved within the submission workspace.

Enhances your current admin process for reviewing records.

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Permissions

Permissions

➢ Add/Remove Access to this specific form

➢ Add/Edit/Delete Profiles

➢ Restrict admins access to certain students

➢ Export/Import Profiles and/or Permissions

Revisions

Revision #1: Default Views

Edit the All Submissions View and add the following: submission date, approval date & delivery date
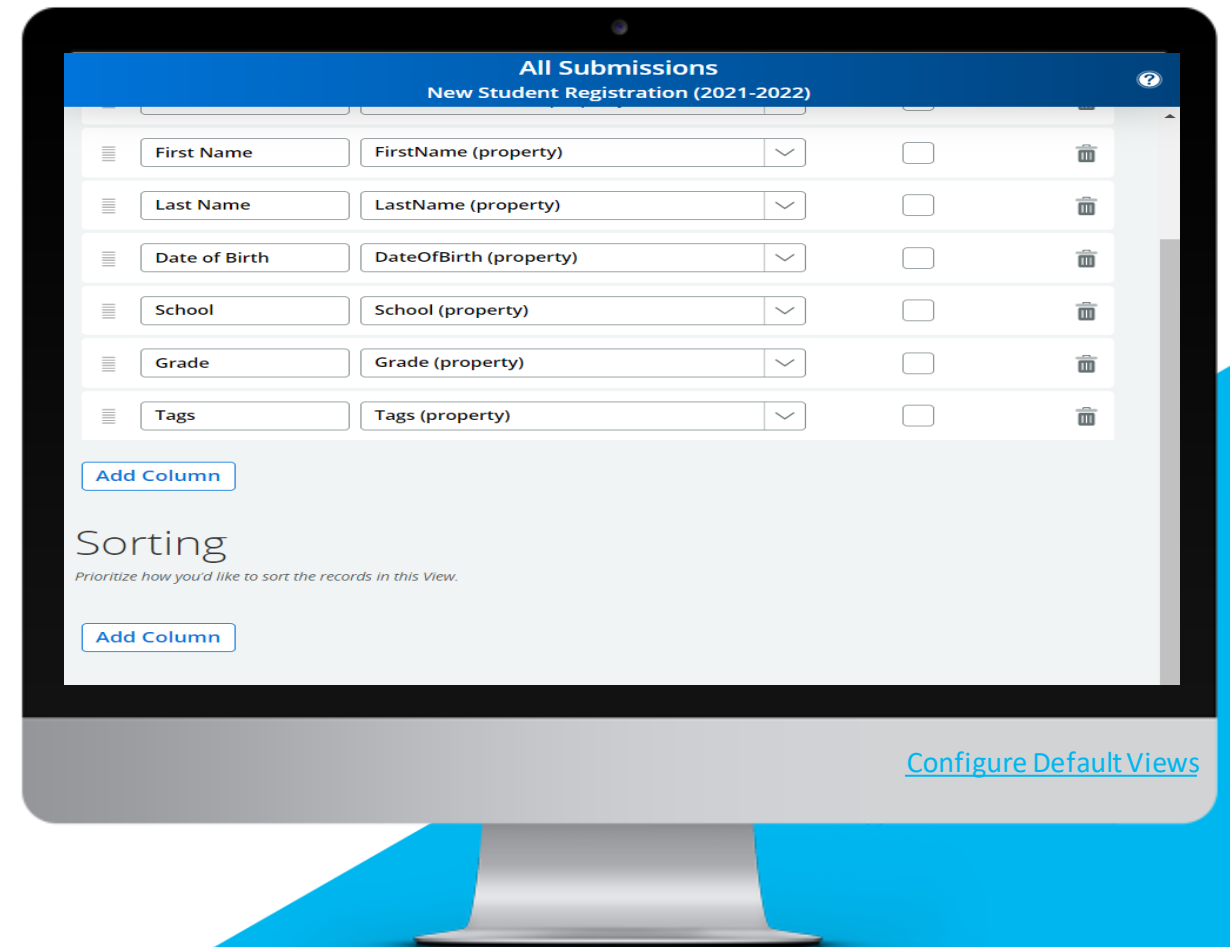
Configuration > General > Choose Form > Views > Add Column > Choose Fields
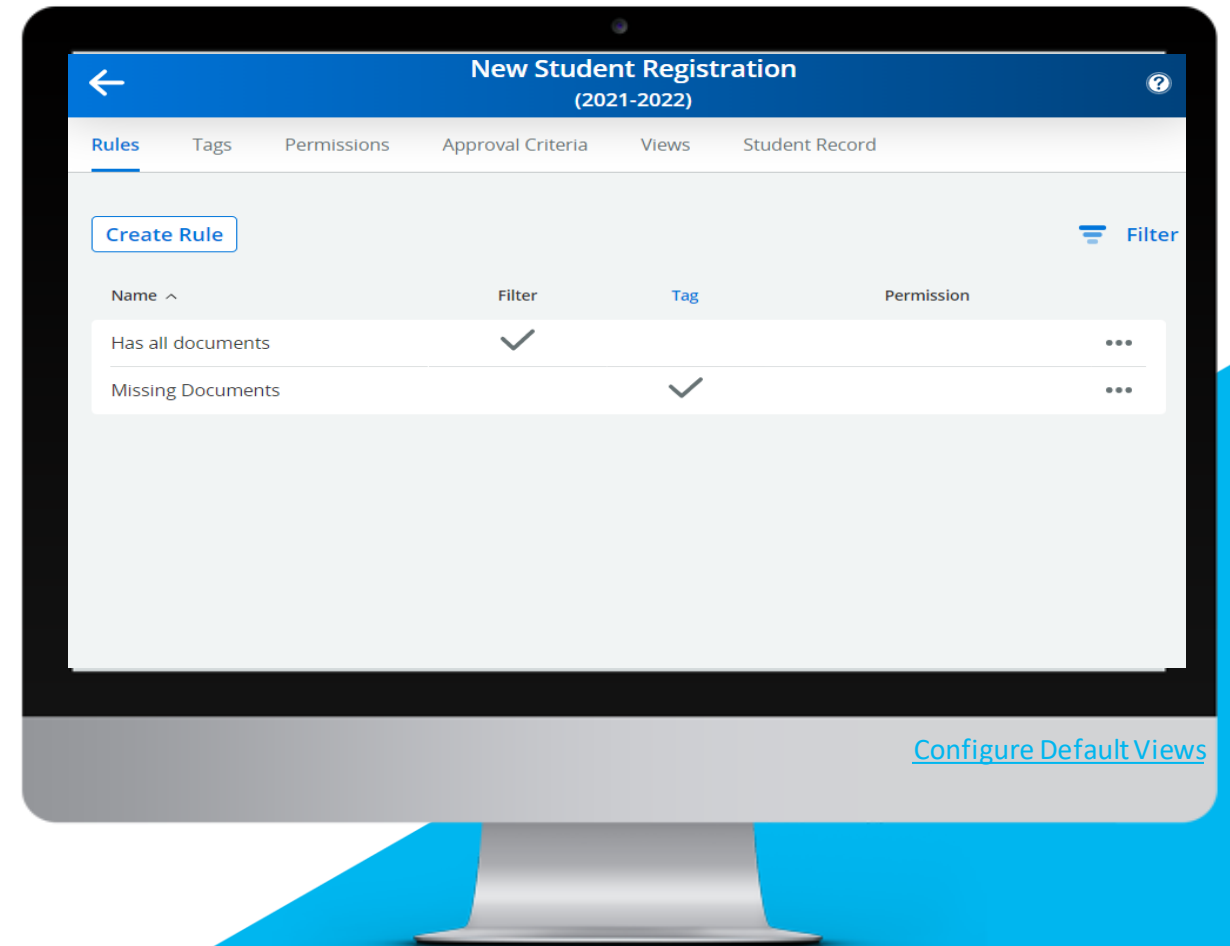
Revision #2: Sorting Views

Sort the All-Submissions View by School and then Grade

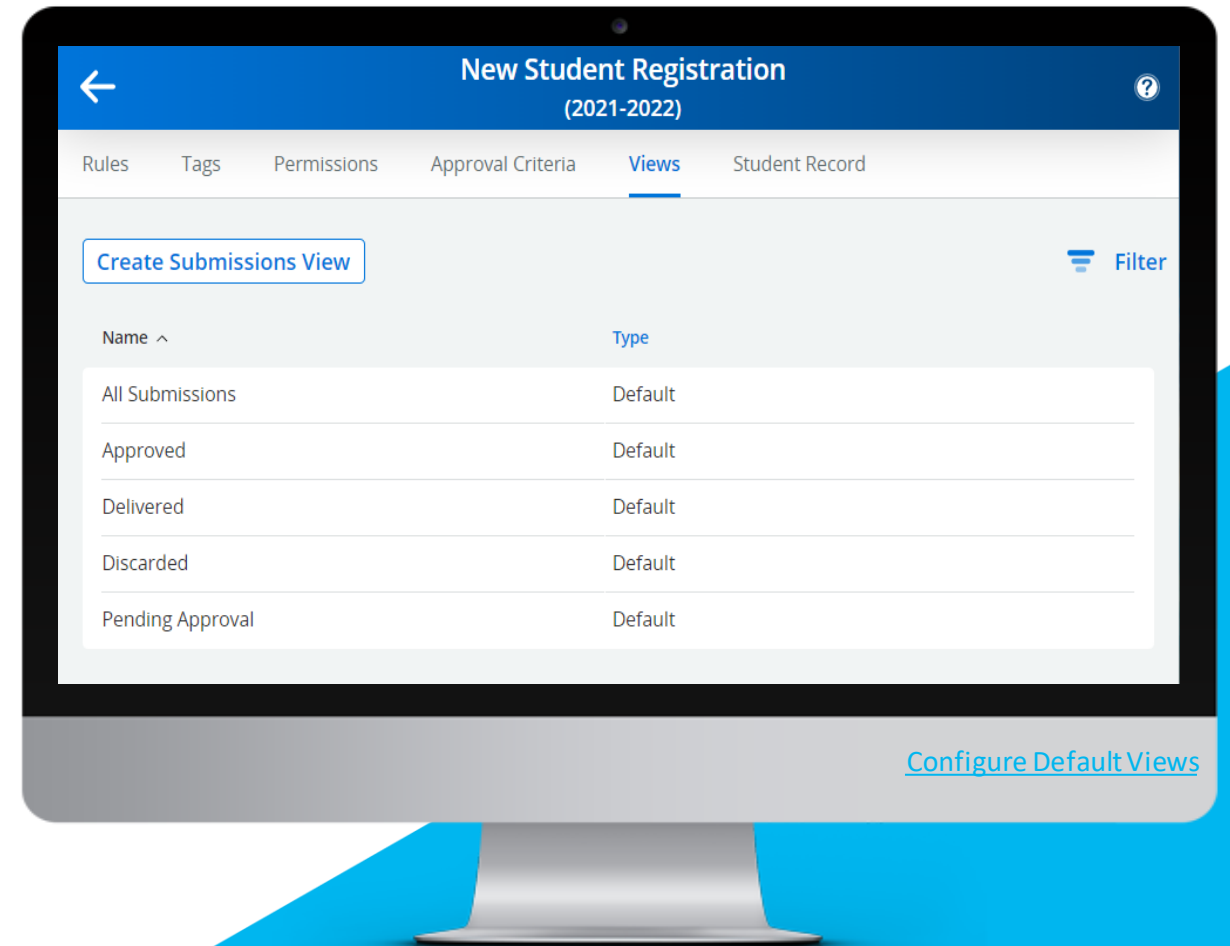Configuration > General > Choose Form > Views > Sorting > Add Column

Revision #3: Create a Custom View

Create a Custom View with the following:

- **Name: Export**
- **Permissioned Out to: Admin, Nurse**
- **Columns: First & Last Name, Grade, Phone Number**
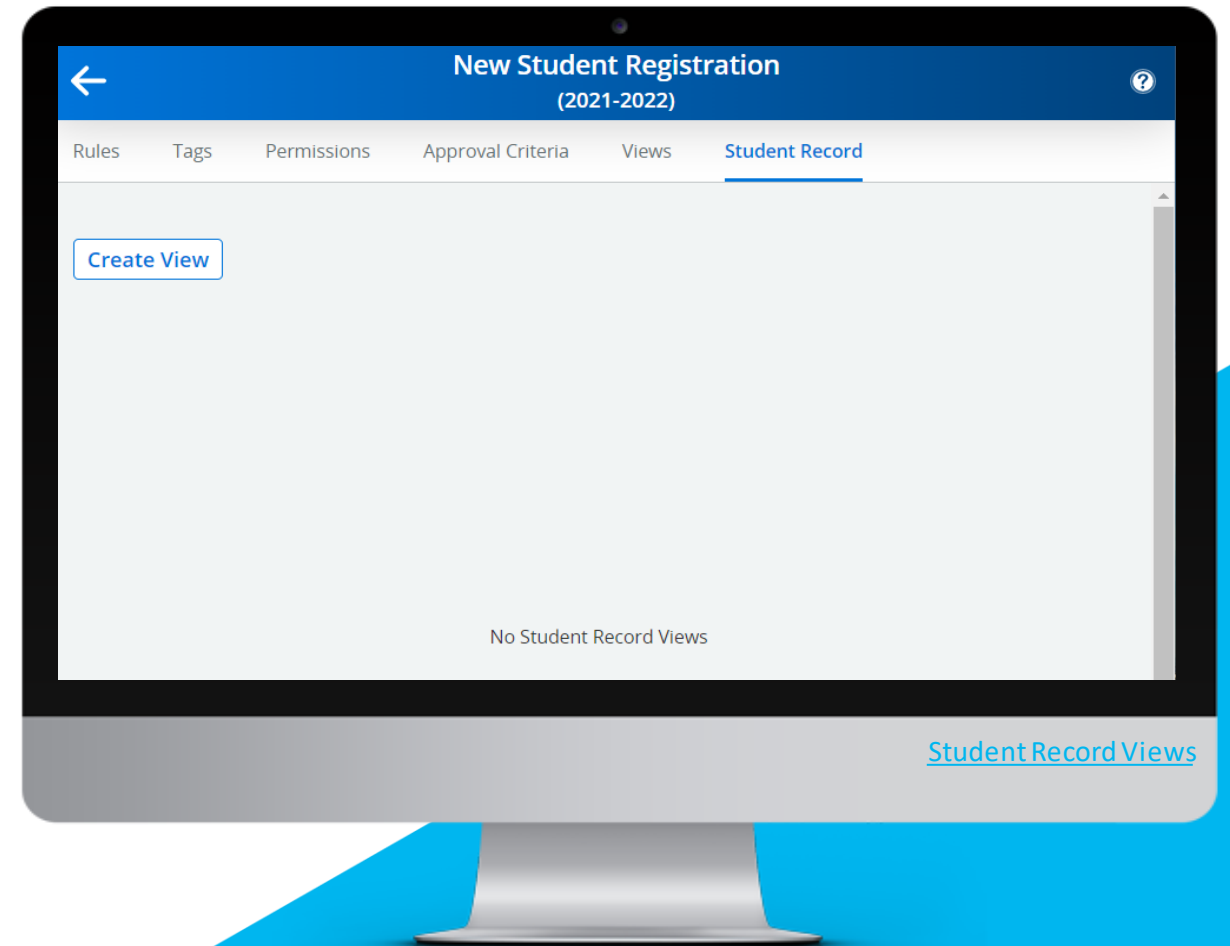- **Only pull in students submitted prior to 08/10/2022 and School B**

Configuration > General > Choose Form > Views > Create Submissions View

Revision #4: Student Record Views

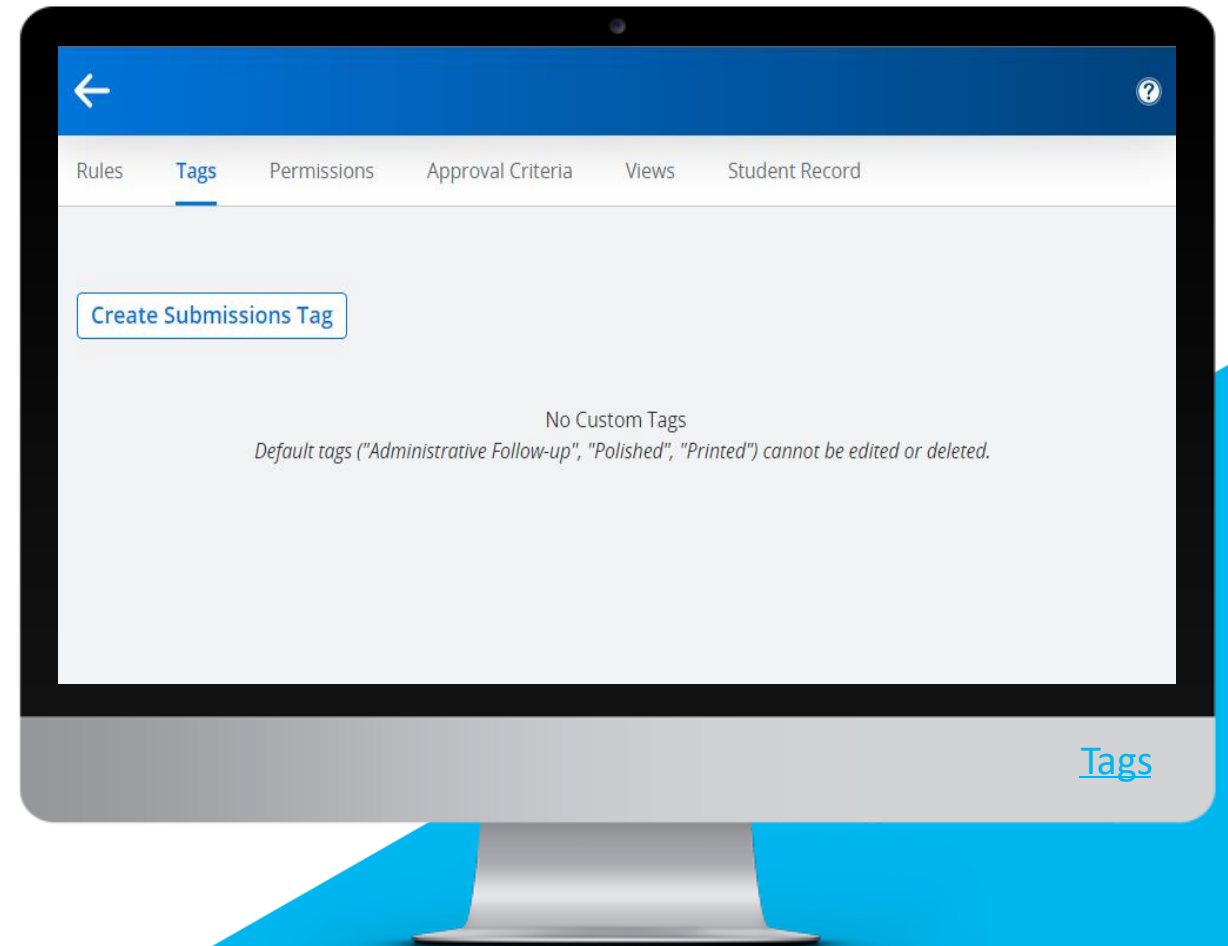Create a Student Record View for Nurses.

Configuration > General > Choose Form > Student Record > Create View

Revision #5: Create Manual Tags

Create manual tags for the following: Review Address, Review Documents and Admin Reviewed.
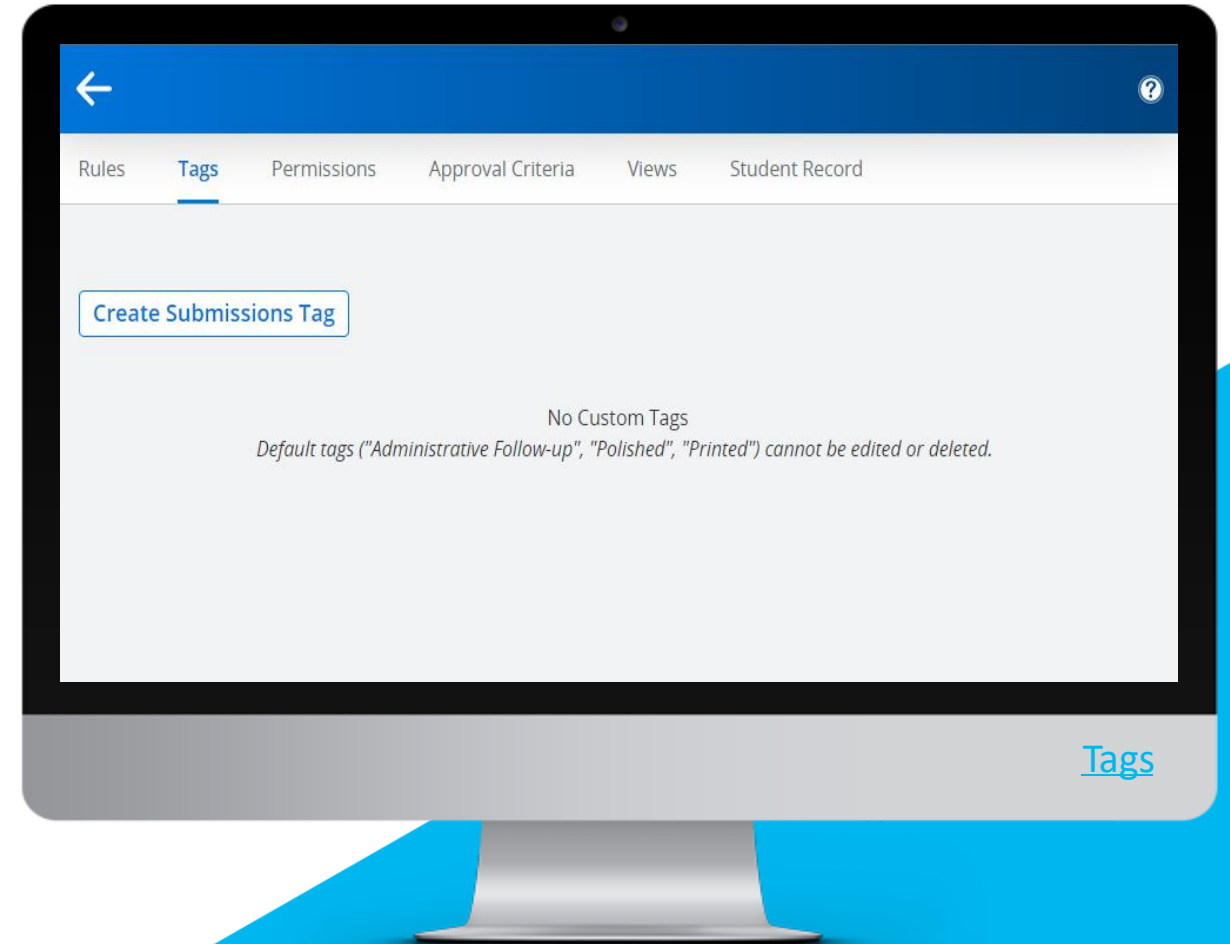
Configuration > General > Choose Form > Tags > Create Submissions Tag > Enter Name > Assign Profile > Save

Rules   **Tags**   Permissions   Approval Criteria   Views   Student Record

Create Submissions Tag

No Custom Tags
Default tags ("Administrative Follow-up", "Polished", "Printed") cannot be edited or deleted.

Tags

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Revision #6: Create an Automatic Tag

Create an automatic tag that tags a record when documents are missing.

Configuration > General > Choose Form > Tags > Create Submissions Tag > Enter Name > Assign Profile > Check Use Rules > Custom Rule Type > Create New Rule

Rules   Tags   Permissions   Approval Criteria   Views   Student Record

Create Submissions Tag

No Custom Tags
Default tags ("Administrative Follow-up", "Polished", "Printed") cannot be edited or deleted.

Tags

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Revision #7: Create a Filter

Create a filter to show all records that said Yes to if they had allergies.

Configuration > General > Choose Form > Rules > Enter Name > Choose Filter Category > Set up Rule

New Rule
New Student Registration (2021-2022)

Name *Required*

New Rule

Category *Required*
☑ Filter
☐ Tag Rule
☐ Permission Rule

Filter Permissions

Available in:
☐ Roster
☐ Submission

Profile

Add Profile

Cancel   Save

Rules

29

Revision #8: Create a Tag Rule

Create a tag rule that would be used for a tag for when a record says Yes for other medical issues and is in grade 7.

Configuration > General > Choose Forms > Rules > Enter Name > Choose Tag Rule Category > Set up Rule

Rules

Revision #6: Create a Permission Rule

Create a permission rule for admins so they only see 1 school.

Configuration > General > Choose Form > Rules > Enter Name > Choose Permission Rule Category > Set Up Rule

To add to an admins profile Configuration > General > Permissions > Find Admin > Edit > Choose Permissions Rule > Add > Save

Rules

Permissions

Revision #7: Approval Criteria

Set up Approval Criteria to ensure the new manual tags added in previous revisions are included in Approval Criteria

Configuration > General > Choose Form > Approval Criteria > Add Rule > Save

New Student Registration
(2021-2022)

Rules   Tags   Permissions   **Approval Criteria**   Views   Student Record

▼ Rules

Tags is Polished
AND
Tags is Printed
AND
Tags is not Administrative Follow-up

Edit

Approval Criteria

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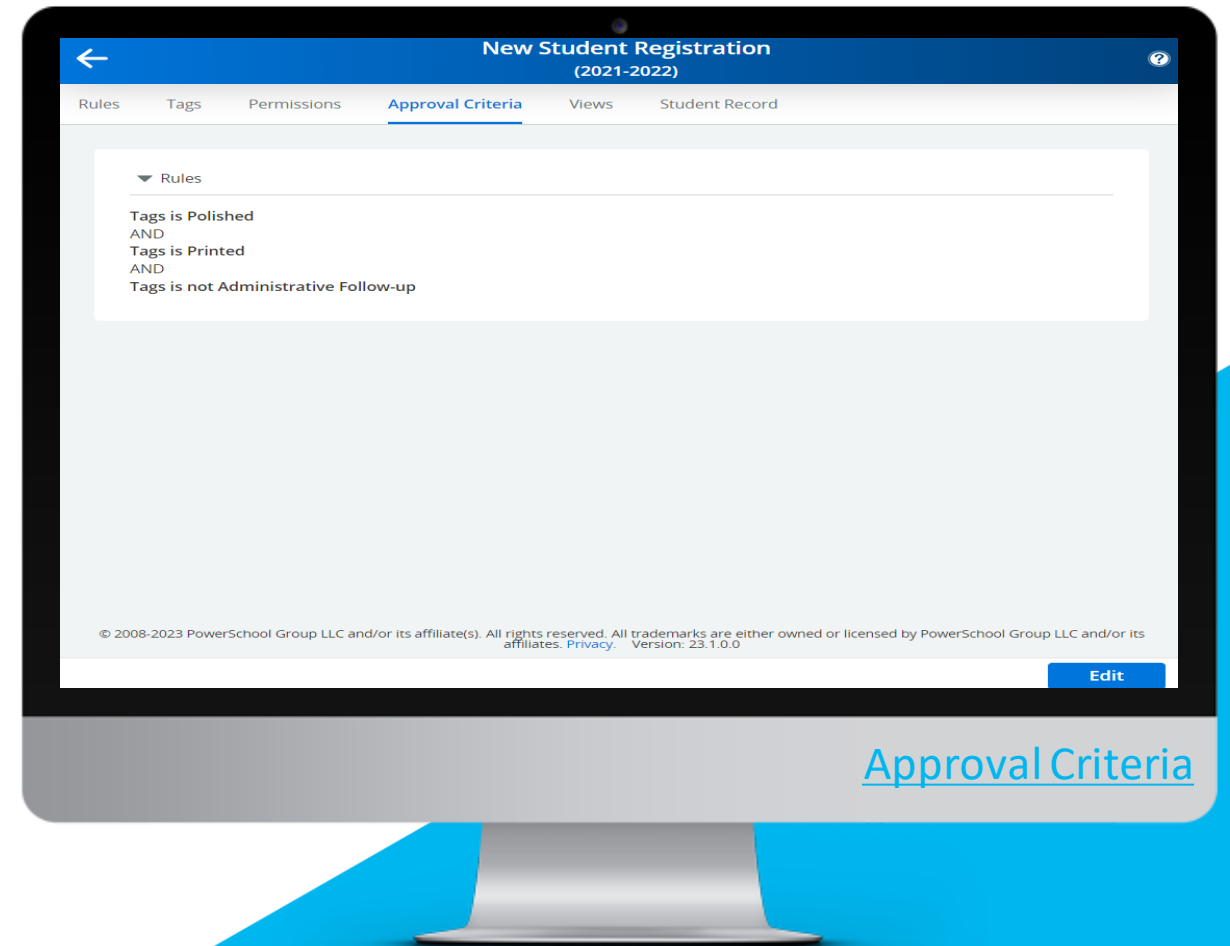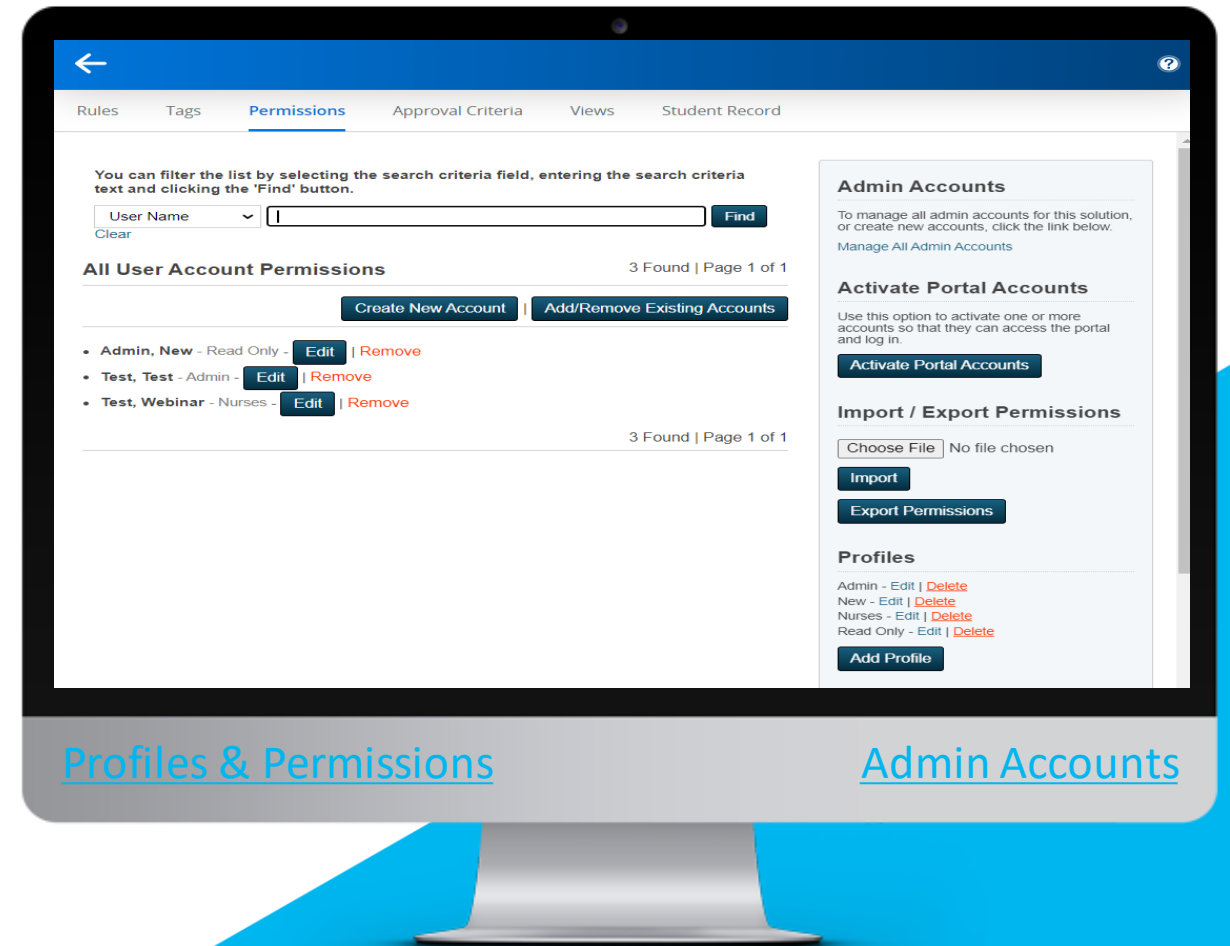
Revision #8: Permission Profiles

Add a new Profile for front office staff members.

Configuration > General > Choose Form > Permission > Add Profile > Enter Title

Profiles & Permissions

Admin Accounts

Revision #8: Permissions Admin Notification

Add Submission Notification Email to an admin profile

Configuration > General > Choose Form > Permission > Export Permissions > Change SubmissionNotificationEmail column to TRUE > Add expression to the column SubmissionNotificationEmailExpression > Choose File (import/export permissions)

Admin Notification

Resources

Help Guide & Community

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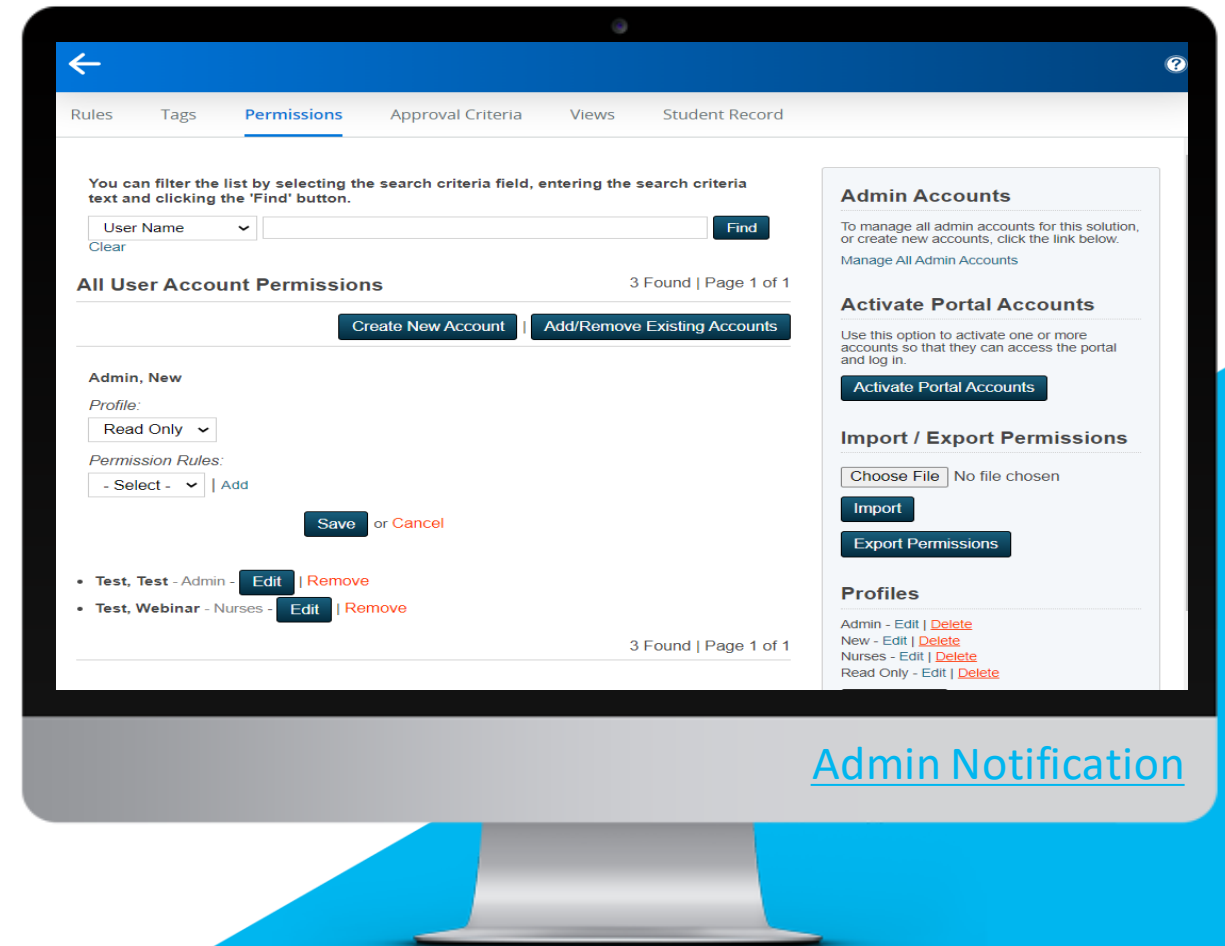
Resources

Help Guide	Community
Views	Workspace Features & Tools
Rules	Filters & Tags
Tags	Property Fields
Approval Criteria	Default Views
Student Record Views	Custom Views
Permissions	Admin Notification
	Feature Index
	Tips & Tricks for Configuration in the Workspaces
	Student Record Views

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Questions

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Upcoming Events & Webinars

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Upcoming Events

Enrollment Office Hours
Wednesdays @ 11am ET / 8am PT

https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-PowerSchool-Enrollment-Ask-the-Experts-2023/ta-p/453326   *Recordings found here

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Upcoming Webinars

https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-Enrollment-PowerUps-2023/ta-p/453567

Delivery – Come join us in learning how to deliver students (regardless of which SIS you have), and troubleshooting any errors to ensure successful delivery. As well as some PowerSchool SIS-specific integrations at the end.
Mar 14

Record Management -- Come learn about the different tools you can use to help you and your administrators manage records and assist families in submitting materials.
Apr 18th

Communication Templates -- During this session, we will cover where to find your communication templates, how to edit them as well to create new ones.
May 16th

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