



# 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.



**Process**

Step 1 - Description\*   Step 2 - Tasks\*   Step 3 - Data Transfer   Step 4 - Deadline   Step 5 - Automation

Name required

Mar Office Hours Test

Description required

Mar Office Hours Test

Process enabled

Category required

Evaluation

This process applies to the following job types required

<input type="checkbox"/> All	<input type="checkbox"/> alpha	<input type="checkbox"/> Assistant Principal
<input type="checkbox"/> Abdul's Test	<input type="checkbox"/> Athletics	<input type="checkbox"/> AUXILIARY
<input type="checkbox"/> Asst. Superintendent	<input type="checkbox"/> CAMPUS ADMINISTRATION	<input type="checkbox"/> Cessna Test



## 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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Step 1 - Description\*   **Step 2 - Tasks\***   Step 3 - Data Transfer   Step 4 - Deadline   Step 5 - Automation

Tasks	Groups
<b>Meetings &amp; To-Dos</b>	
Meeting	+
To-Do	+
<b>Forms</b>	
Search	
<input type="text"/>	
Form Category	
Evaluation	▼
IA Scaffold Form	+
1000	+

**Build a Process**

1. Task : Meeting
2. 2020 - Principal Mid-Year Progress Form  
Form : 2020 - Principal Mid-Year Progress Form





# Form Settings

- To configure the settings for individual forms, select the “...” symbol beside the task name and then 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.



**Edit Form**

Person Responsible required

Supervisor

Required Step required

Yes

Must other Steps be completed before this Step may begin? If so, indicate those Steps here

1. Task : Meeting

Workflow

Approval

[Show Scheduling \(optional\)](#)

[Show Advanced \(optional\)](#)

**Edit Form**

Step Start Date

Hide Step Before Date

Step Due Date required

Anytime (before process is due)

Date

Within

Days of Step

[Hide Advanced \(optional\)](#)

Form Select

Form Select

User must choose only this form when completing this Step:

2020 - Principal Mid-Year Progress Form

User may choose from any form in this category



## 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.

Step 1 - Description\*   Step 2 - Tasks\*   **Step 3 - Data Transfer**   Step 4 - Deadline   Step 5 - Automation

Source	Destination
Form: 1. Long Answer Matrix TExt Question: Test this	Form: 2. Long Answer Matrix TExt Question: Test this Destination field is: ReadOnly
Form: 1. Long Answer Matrix TExt Question: Test	Form: 2. Long Answer Matrix TExt Question: Test Destination field is: ReadOnly
Form: 1. Long Answer Matrix TExt Question: Test	Form: 2. Long Answer Matrix TExt Question: Test Destination field is: ReadOnly

*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.*

### Edit Data Transfer Rule

Source

Form required

1. Long Answer Matrix TExt

Field required

Test this

Destination

Form required

2. Long Answer Matrix TExt

Field required

Test this

Destination field is required

Read Only

Cancel   Apply

# 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

Deadline for this process

Step 1 - Description\*   Step 2 - Tasks\*   Step 3 - Data Transfer   **Step 4 - Deadline**   Step 5 - Automation

No Deadline

On or Before this Date   April / 08 / 2022/2023

Within  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.

### Who belongs in the automation

Step 1 - Description\*   Step 2 - Tasks\*   Step 3 - Data Transfer   Step 4 - Deadline   **Step 5 - Automation**

Note: Automations generate lists of staff that meet the following criteria and belong to the job types selected on "Step 1 - Description" of the process builder. To assign the staff list to the selected process.

1   Last Completed Eval Na   EQUAL   Test Multi year   Remove

+ Add Criteria    All criteria are true.    Any criteria are true.   Clear

### When to Run Automation

Calendar Date   May   /   30

*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.”*

HR Dashboard

- My Folder
- HR Tools
- Signatures
- Configuration
- Calibrations
- Walkthrough

## Processes Ready to Be Started

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

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1-8 of 14

# 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.

Name required

Robert Test

Process (Current Year) required

Central School Test

Walkthrough required

Classroom Teacher Observation Form

[Preview Form](#)

Workflow required

testing

# 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.

Groups

Configuration > Groups

Search:

Name	Description	Member count	
My Staff/Walkthroughs	This group will allow its members to see the My Staff area and access to the Begin Walkthrough link (this is for people that do not already have direct reports)	4	<a href="#">Edit</a>

# 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>