

# Welcome to the PowerSchool Employee Records & Onboarding PowerUp!



**Personalized Education**  
for Every Journey

# Utilizing Reports & Exporting Data

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# Agenda

1 Checklist Completion Reports

2 Custom Reports

3 Contracts & Letters Reports

4 Q&A

# Reports – Checklist Completion

- This report is used to check the progress of paperwork being completed from a checklist
- Completion status is important for individual task completion, as well as overall checklist completion

<input type="checkbox"/>	First	Last	Location	Assigned	I-9	I-9 Supporting Documentation	W-4	State Tax Form	Employee Information Form	24 Pay Plan Enrollment	Direct Deposit	Staff ID Picture	New Account Information	New Policy	Status
<input type="checkbox"/>	Katherine	Chavez	Ocean Middle ...	10/25/2023 04:39 PM	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	🕒Complete
<input type="checkbox"/>	Eli	Carter	Central Office	06/08/2023 03:25 PM	○	○	○	●	○	○	○	✓	○	○	
<input type="checkbox"/>	Gabriel	Harris	Vernon High S...	06/02/2023 07:30 PM	○	○	○	○	○	⊗	⊗	⊗	○	○	
<input type="checkbox"/>	Caleb	Torres	Vernon High S...	06/02/2023 07:30 PM	○	○	○	●	✓	○	○	✓	○	○	
<input type="checkbox"/>	Charles	Roberts	Vernon High S...	06/02/2023 07:30 PM	○	○	○	○	○	○	○	✓	○	○	
<input type="checkbox"/>	Justin	Gray	Vernon High S...	06/02/2023 07:30 PM	○	○	○	○	○	⊗	⊗	⊗	○	○	
<input type="checkbox"/>	Robin	Franklin	Ocean High Sc...	06/02/2023 07:30 PM	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	🕒Complete

# Settings – Completion Status

- Completion Status can be chosen in the workflow settings
- Forms can be considered complete when:
  - They are submitted
  - A specific step is complete
  - All steps have been complete
- Changing when the form is considered complete can impact Custom Reports as well as the Checklist Completion Report

	Approver	Step Type	Approver Type	
1	Direct Report	Signature	Direct Report	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2	Human Resources	Approval	Group	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
3	Supervisor	Review	Supervisor	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Forms Are Considered Complete When:  
**Step 2 Is Completed**

# Reports – Custom Reports

- Can be used to pull in Employee Information and Form Elements to create a report
- Data elements can be filtered for on the spot exporting, or you can be scheduled to export
- Form status can be viewed

	First Na...	Last N...	Current Locatio...	Current Job Title...	Requested Locati...	Requested Positio...	Hire D...	Tenure D...	Submitted Date Ti...	Created Date Ti...	Completed Date Ti...
1.	Gabriel	Harris	15	Art Teacher	Vernon High School	English Teacher	01/22/...	01/22/2018	11/01/2022 09:45 AM	11/01/2022 09:45...	
1.	Lillian	Harris	2	Future Certified ...	Vernon Middle Sc...	Music Teacher	02/22/...	02/22/2018	03/13/2023 11:47 AM	11/01/2022 11:02...	
2.	Michelle	Robert...	15	Economics Teac...	River High School	Economics Teacher	08/22/...	08/22/2015	11/01/2022 09:47 AM	11/01/2022 09:47...	11/01/2022 11:01 AM
1.	Cora	Alexan...	9	Assistant Principal			06/22/...			11/07/2023 12:00...	
1.	Preston	Burns	5	Accountant Test	Any	Math Teacher			07/13/2023 02:20 PM	07/13/2023 02:15...	07/13/2023 02:25 PM
1.	Santiago	Fisher	15	Paraprofessional	River Middle School	Paraprofessional	03/22/...		10/31/2022 09:01 PM	10/31/2022 09:01...	
1.	Elena	Fisher	15	Paraprofessional	Mountain High Sc...	Paraprofessional	04/22/...		10/31/2022 09:03 PM	10/31/2022 09:02...	
1.	Ezekiel	Ford	15	Paraprofessional	Ocean High School	Paraprofessional	07/22/...		10/31/2022 08:52 PM	10/31/2022 08:52...	

[Link to previous PowerUp: Configuring eForms to Streamline Custom Reports](#)

# E-Form Data – Dropdown Lists

- Can be used to control the data collected
  - Only select from the options available
- Customize export text
  - Codes, abbreviations, etc.
- Need to be set up before adding to forms

List Items

☰

Display Text:

Export Text:

Display Text:

Export Text:

# E-Form Data – Radio Buttons

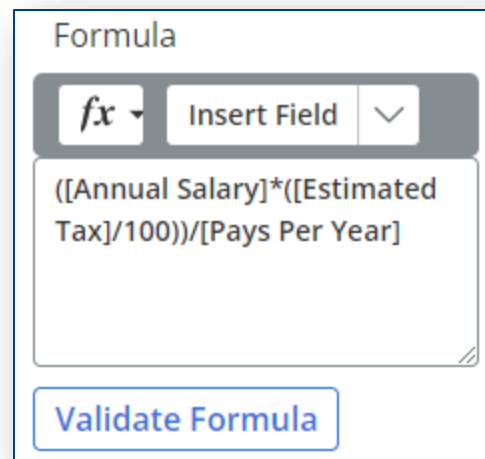
- Can be used to control the data collected
  - Only select one option per "group"
- Customize value if selected
  - Codes, abbreviations, etc.
- Do not need to be set up before adding to forms, can be set up directly in the PDF Form Builder
- Only available in Mixed Forms

The screenshot shows a 'Properties' panel for a radio button field. It includes a 'Field/Group Name' field with a 'required' indicator and a dropdown menu showing '--New Name For Group--'. Below this is a 'Groups..' button. At the bottom, the 'Value if Selected' field is highlighted with a red border and also has a 'required' indicator.



# E-Form Data - Calculations

- Allows for the display of resulting formulas based on other fields on the form
- The result of a calculation displays as a **2-digit decimal**
- Calculations are read-only fields which generally support basic arithmetic fields (**+, -, \*, /**)
- Other supported formulas: “Average” “Sum”, “Minimum”, "Maximum".



The screenshot shows a 'Formula' dialog box. At the top, there is a label 'Formula'. Below it is a toolbar with a dropdown menu showing 'fx', a button labeled 'Insert Field', and another dropdown menu. The main text area contains the formula: 
$$\frac{([\text{Annual Salary}] * ([\text{Estimated Tax}] / 100))}{[\text{Pays Per Year}]}$$
 At the bottom of the dialog is a button labeled 'Validate Formula'.

# E-Form Data – Hidden Fields

- Certain fields have the option to choose if the "Field is Visible"
- Useful for reporting purposes
- Fields include:
  - Calculations
    - Results of a calculation
  - Date Picker
    - Default Date
    - Default "Today's" Date
  - Text Box
    - Default Answer

▼ Advanced

Link Field To

--Do not Link This Field--

Field is Visible

# Settings – Export Settings

- Data Format
  - Settings can be changed as needed
- Data Set
  - Collapsing data will give you one row per employee which may be desired if combining data from different forms
- Scheduled Exports
  - Custom reports built can be exported on a scheduled basis
  - An SFTP site needs to be configured by support prior to exporting

### Export Settings

Settings below will only be reflected in the Custom Reports

#### Data Format

Column Headers

Include column headers when exporting to a CSV file

Delimiter

Comma

Date Format

MM/DD/YYYY

Numeric Format

Number (1,234.57)

Data Set

Collapse data set to a single row per staff member using the most recent form information

Index File

Export Index File with PDF/TIFF files

PDF/TIF Folder Structure

Export PDF/TIF files to a single folder on the SFTP

[Save Changes](#)

#### Scheduled Exports

[New Scheduled Export](#)

# Reports – Contracts & Letters

- These reports are used to check the progress of Contracts and/or Letters being signed
- Additional tasks can be done such as sending reminders, retracting, and exporting results

2024-2025 Coaches Report - 8 Signed Out of 40 Sent Export

Search

Filters

Completed  Archived  Retracted

Location  Job Types  Contract Sent  To

Contract Signed  To

Contract Completion Report

<input type="checkbox"/>	Last	First	Employee ID#	Job Type	Location	Last Viewed	Date Sent	Date Completed	Views	Status	
<input type="checkbox"/>	Davis	Alexander	1907	Administrative Associate I	Central Office	11/8/2022	11/8/2022	11/8/2022	1	Completed	<a href="#">Retract</a>
<input type="checkbox"/>	Miller	Michael	2051	Custodian	Ocean Elementary School	11/8/2022	11/8/2022	11/8/2022	1	Completed	<a href="#">Retract</a>
<input type="checkbox"/>	Garcia	Ethan	1937	School Counselor	River High School	11/8/2022	11/8/2022	11/8/2022	1	Completed	<a href="#">Retract</a>
<input type="checkbox"/>	Jones	William	2011	Teacher	River Middle School	11/8/2022	11/8/2022	11/8/2022	1	Completed	<a href="#">Retract</a>
<input type="checkbox"/>	Brown	Mason	1867	Assistant Principal	River Middle School	11/8/2022	11/8/2022	11/8/2022	1	Completed	<a href="#">Retract</a>
<input type="checkbox"/>	Johnson	Liam	2009	Teacher	Mountain Middle School	11/8/2022	11/8/2022	11/8/2022	1	Completed	<a href="#">Retract</a>



# Upcoming Talent PowerUp Meetings

- **Applicant Tracking:** Customizing Filters to Streamline Application Review
  - Wednesday, August 21, 2024 at 9 AM Pacific
- **Employee Records:** Configuring Basic & Conditional Workflows
  - Wednesday, September 11, 2024 at 9 AM Pacific
- **Perform:** Automating Process Assignment
  - Tuesday, September 3, 2024 at 9 AM Pacific
- **Professional Learning:** Using Course Tags
  - Wednesday, September 4, 2024 at 9 AM Pacific
- **SmartFind Express:** Substitute Feedback & Communications Tools
  - Tuesday, September 10, 2024 at 9 AM Pacific

