

Welcome to the PowerSchool Perform PowerUp!

Personalized Education for Every Journey

Workflow Tips & Tricks

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Agenda

- 1 Product Updates
- 2 Purpose & Configuration of Workflows
- 3 Tips & Tricks
- 4 Q&A

Workflow Purpose

- Used to share form information with necessary parties
- Types of Workflows
 - Signature – Collect electronic signature from the assigned party
 - Review – Allows stakeholder to review the document
 - Approval – Designated approver can approve or deny the form
 - Denying a form sends it back up the workflow
- Who can be an approver?
 - Supervisor, unless assigned evaluator
 - Supervisor
 - Assigned Evaluator
 - Direct Report
 - Specific User
 - Member of a Group
 - Role
 - Either Supervisor or Assigned Evaluator

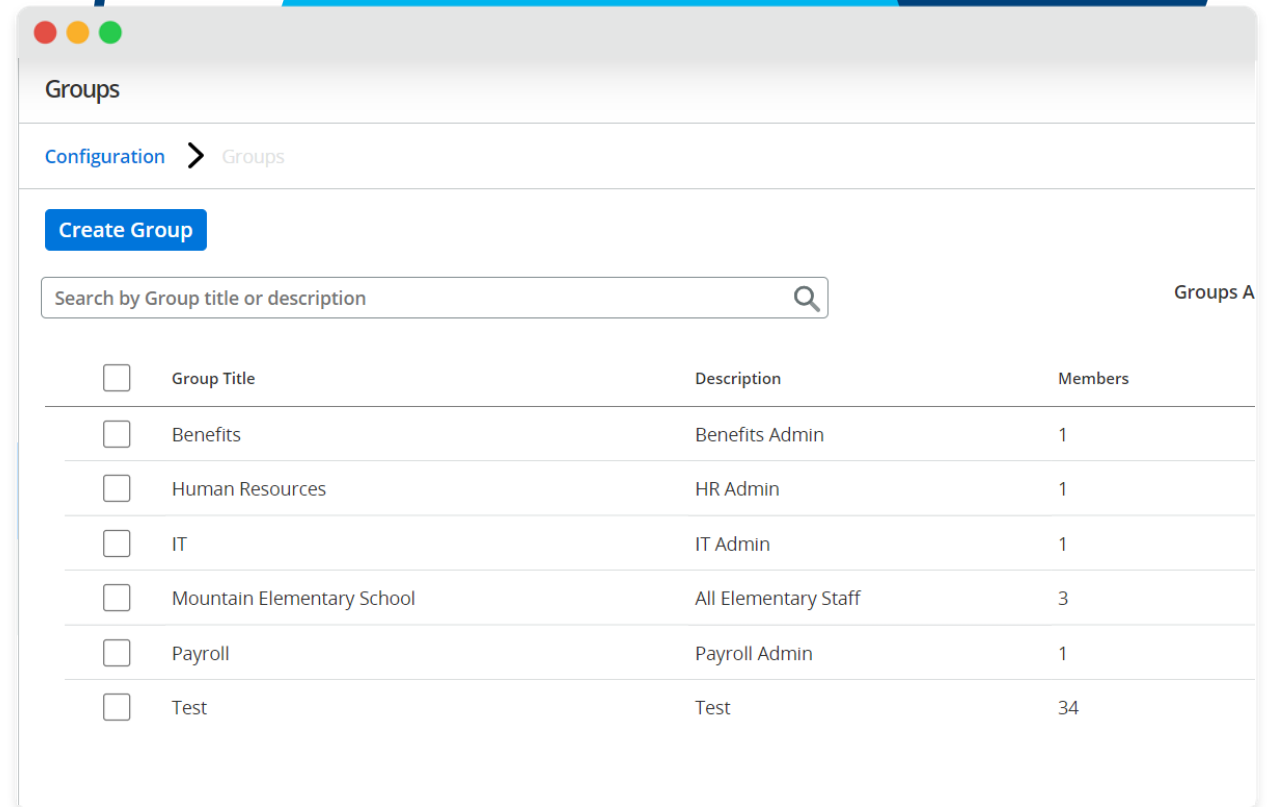


Configuration

Let's Jump In

Tips and Tricks

- Utilize Groups to make it easy to change major approvers in and out of workflows



Tips and Tricks

- Lock the form for various workflow steps
 - Does the signer need to have access to change anything?
 - If it's only a select area they are changing, question permissions can also be adjusted

The image shows a configuration interface for a form step. It includes several dropdown menus and text boxes:

- A dropdown menu labeled "type" with a "required" tag.
- A dropdown menu labeled "signature" with a downward arrow.
- A dropdown menu labeled "Approver" with a "required" tag.
- A dropdown menu labeled "Direct Report" with a downward arrow.
- A text box labeled "Disclaimer".
- A dropdown menu labeled "Step Visibility" with the value "Step Visible" selected.
- A dropdown menu labeled "During Step The Form Is" with a downward arrow.

Tips and Tricks

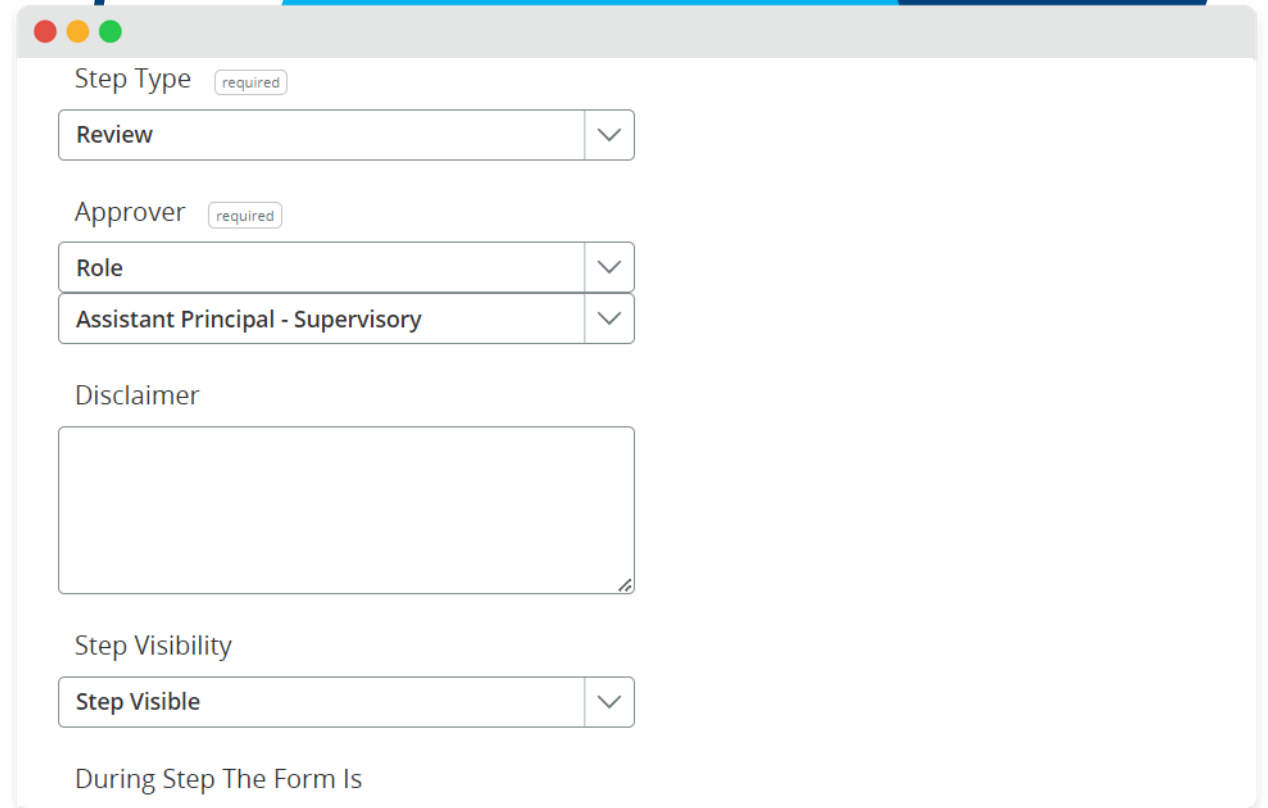
- Modify the form completion to assist with data transfer
 - This would make the task to be considered complete but it would continue through workflow



	Approver
	Direct Report
2	Supervisor, unless Assigned Evaluator
3	Human Resources
Forms Are Considered Complete When	
Step 2 Is Completed	

Tips and Tricks

- Building out custom roles can allow you to dynamically control workflow steps for non-supervisors



The image shows a screenshot of a web-based configuration form for a workflow step. The form is styled to look like a window with a grey title bar and three colored window control buttons (red, yellow, green) in the top-left corner. The form contains the following fields:

- Step Type**: A dropdown menu with the value "Review" selected. A "required" label is to the right of the dropdown.
- Approver**: A dropdown menu with the value "Assistant Principal - Supervisory" selected. A "required" label is to the right of the dropdown.
- Disclaimer**: A large, empty text area with a small cursor icon in the bottom-right corner.
- Step Visibility**: A dropdown menu with the value "Step Visible" selected.
- During Step The Form Is**: A label for the next field, which is currently empty.



Upcoming Talent PowerUp Meetings

- **Applicant Tracking:** Customizing Filters to Streamline Application Review
 - Wednesday, August 21, 2024 at 9 AM Pacific
- **Employee Records:** Maximizing Reports & Exporting Data
 - Wednesday, August 14, 2024 at 9 AM Pacific
- **Perform:** Automating Process Assignment
 - Tuesday, September 3, 2024 at 9 AM Pacific
- **Professional Learning:** Reporting for Compliance & Onboarding
 - Wednesday, August 7, 2024 at 9 AM Pacific
- **SmartFind Express:** Maximizing SmartFind Express Help Resources
 - Tuesday, August 13, 2024 at 9 AM Pacific

