

Welcome to the PowerSchool Perform PowerUp!

Personalized Education for Every Journey

Streamlining Processes with Data Transfers

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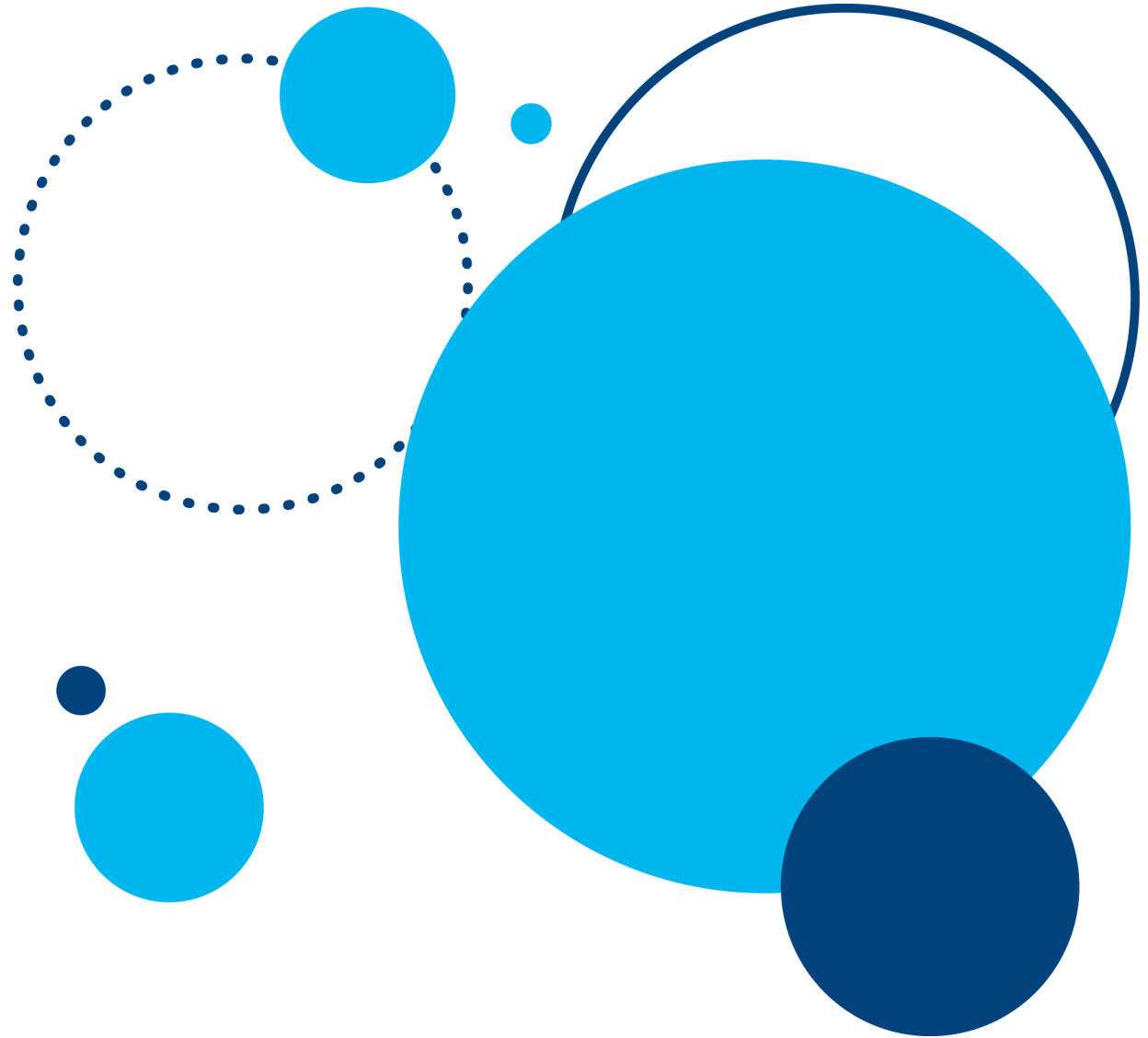


Agenda

- 1 What are Data Transfers?
- 2 Benefits of Including in Processes
- 3 Use Cases
- 4 Setting up Data Transfers

What are Data Transfers?

- Allows you to transfer data from one form in a process to another form in the same process
- The transferred data can be **editable** or **read only**



Benefits of Including in Processes

- Reduce Manual Entry
- Increase Accuracy
- Control Visibility
- Streamline Reporting

Use Cases

Repeating
Information

- Goal Setting
- Evaluation Ratings
- Feedback

Simplifying
Information
on a form

- Evaluation Ratings
- Summary Comments

Limited
Sharing

- Data that you might want to share with a peer

Setting up Data Transfers

- Edit Transfer Rules in Step 3 of a Process
- Select the forms and fields to map
- Decide if the field should be Read Only or Editable

Edit Data Transfer Rule

Source

Form required

1. Question Type Descriptions

Field required

Short Answer

Destination

Form required

2. Perform Question Type Descriptions

Field required

Short Answer

Destination field is required

Read Only

Read Only

Editable

Cancel Apply

Things to keep in mind

- Question Types must be the same on both forms
- Exception with Calculations, which transfer to a Short Answer question type
- Data transfer must be within the same process with forms built into the process
- Update Data Transfer

Update Data Transfer

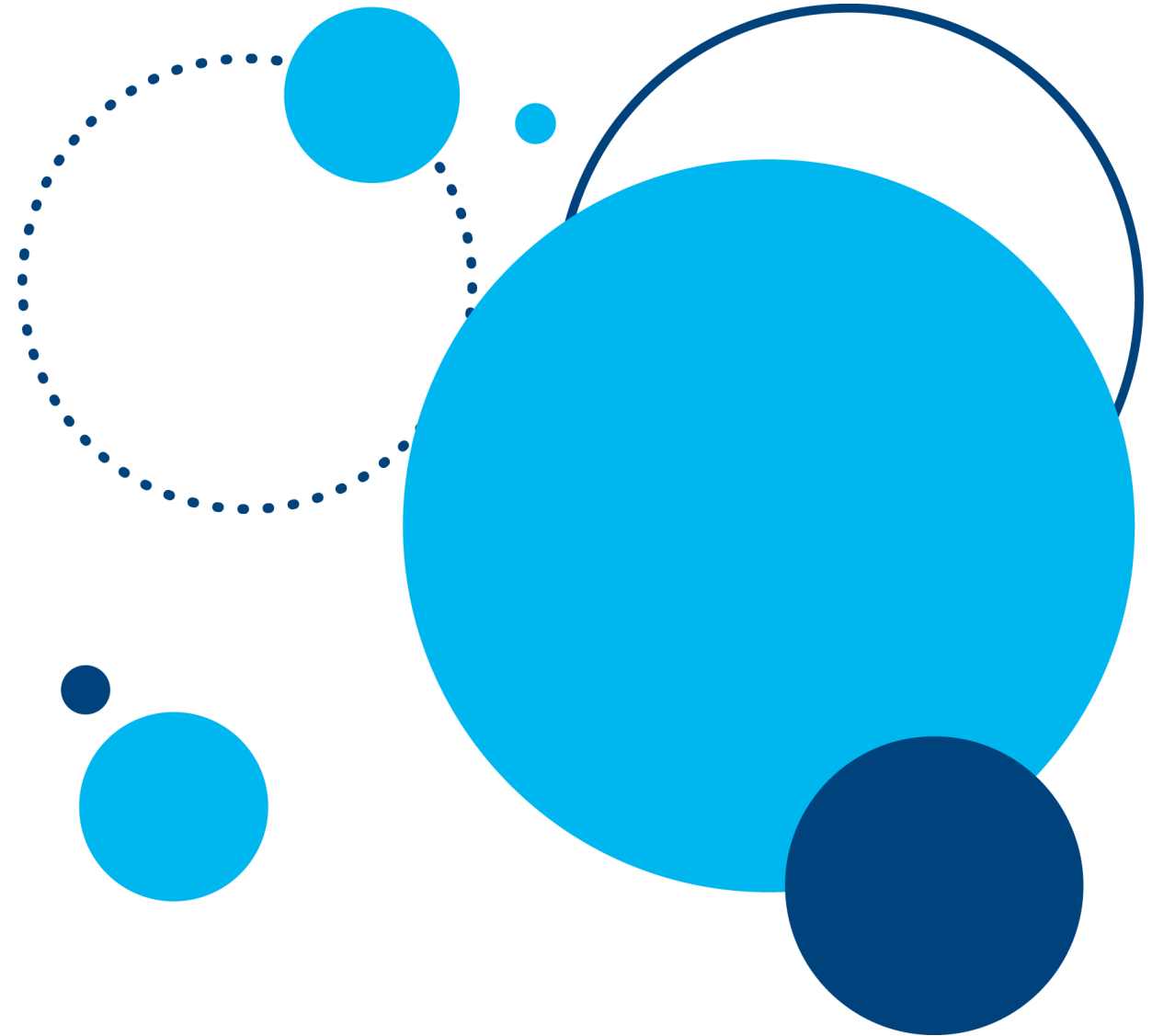
Back

Save Progress

Save & Submit

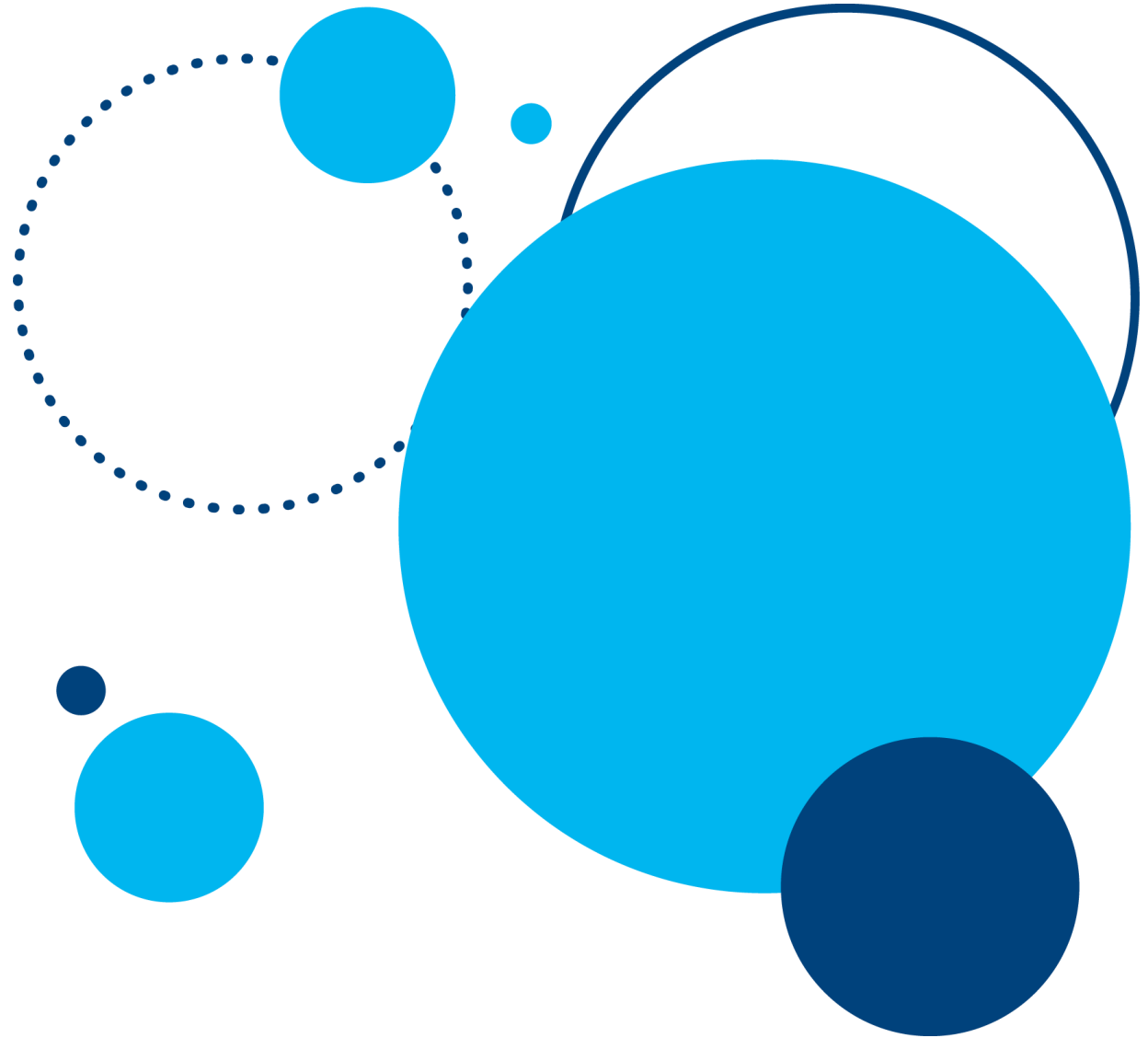
Custom Form Considerations

- Number of Forms
- Length of Forms
- Visibility
 - On the form or different forms
- Question Types
- Disclaimers for data going to or coming from another form



Process & Step Order

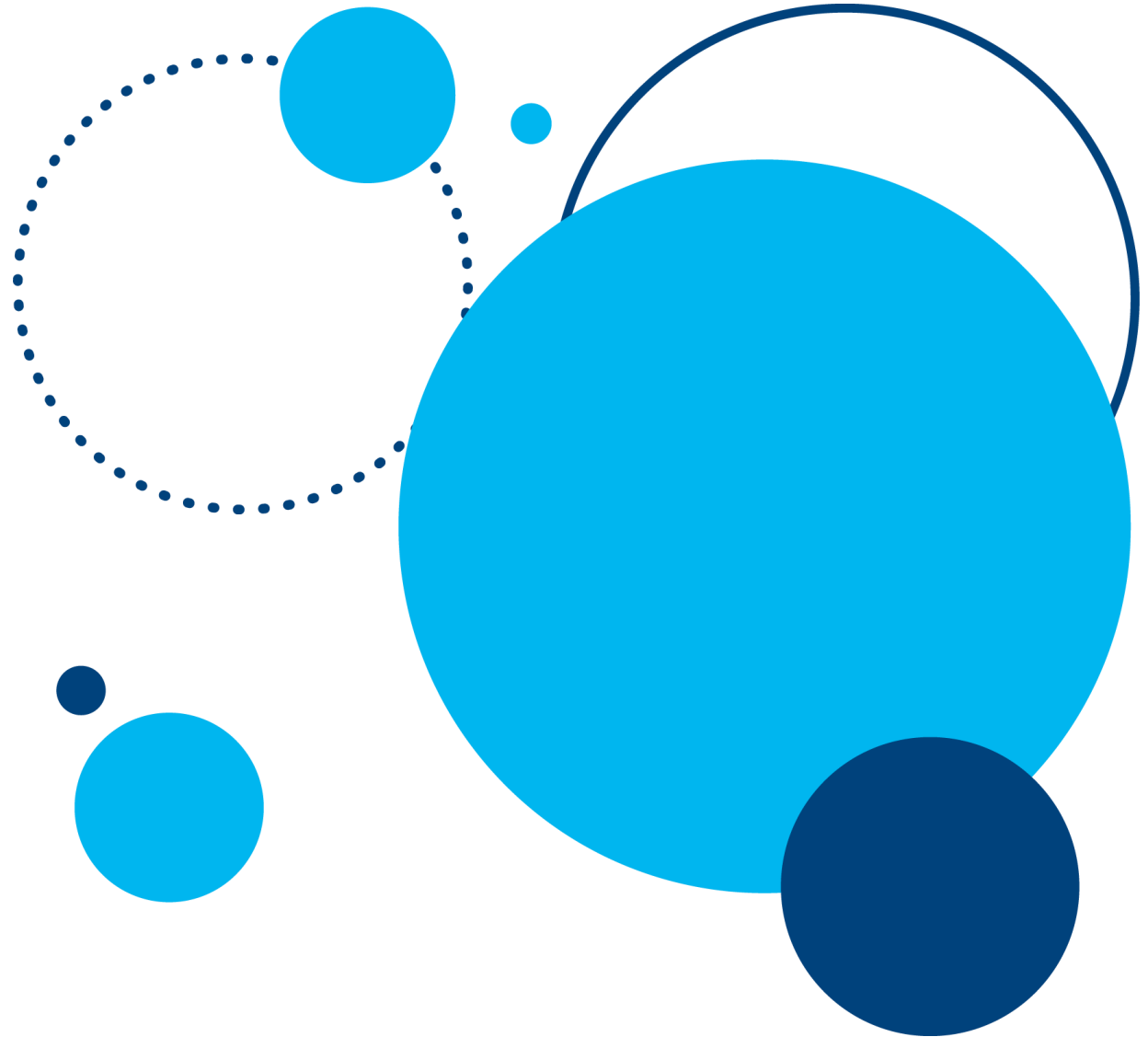
- Number of Steps
- What to include in a process as required/optional
- Timing of when forms are filled out
- Who needs to fill out what





Resources

- [How To: Add data transfers into my process under Perform](#)
- [PowerUp Recording - Utilizing Peer Processes](#)
- [Perform PowerUp: New Task Dashboards & Best Practices with Grouping Tasks](#)



Updates & Helpful Information

- December Release - [More details](#)
- New option to Send Reminders
- Additional Filters
- Updated Direct Report Weekly Summary due within 14 days
- Status names as hyperlinks

The screenshot displays the 'Staff' section of the TALENTED system, specifically the 'Task Dashboard'. The interface includes a navigation menu on the left with options like 'My Folder', 'HR Tools', 'Signatures', 'Configuration', and 'Walkthrough'. The main content area shows filters for 'School Year' (2024/2025) and 'Filter' (All), along with checkboxes for 'Show Required Only' and 'Show Direct Reports of My Direct Reports'. A 'Tasks' section provides a summary of task completion: 'Completed, 0.37% Not Completed, 99.63%'. Below this, a list of tasks is shown with progress bars and status indicators:

Task Name	Tasks	Process(es)	Not Started	OverDue
Year 2 Reflection	14	1	1	13
Year 2 Revision	14	1	1	13
Year 3 Reflection	14	1	1	13
Year 3 Revision	14	1	1	13
Year 4 Reflection	4	1	1	13

Upcoming Talent PowerUp Meetings

- **Professional Learning: Unlocking Potential: Exploring Optional Upgrades and New Releases**
 - Wednesday, December 4, 2024
- **SmartFind Express: Self Auditing your SFE system**
 - Tuesday, December 10, 2024
- **Employee Records: Using Security Groups to Enhance Processes**
 - Wednesday, December 11, 2024
- **Applicant Tracking: (Product) New Admin User Interface Updates & Application Configuration**
 - Wednesday, December 18, 2024
- January dates/topics coming soon!

All sessions
will start at:
9 PT/10 MT
11 CT/12 ET