



PowerUPs

Data Workspace Tools: Views, Filters, & Tags

Patrick Woodford

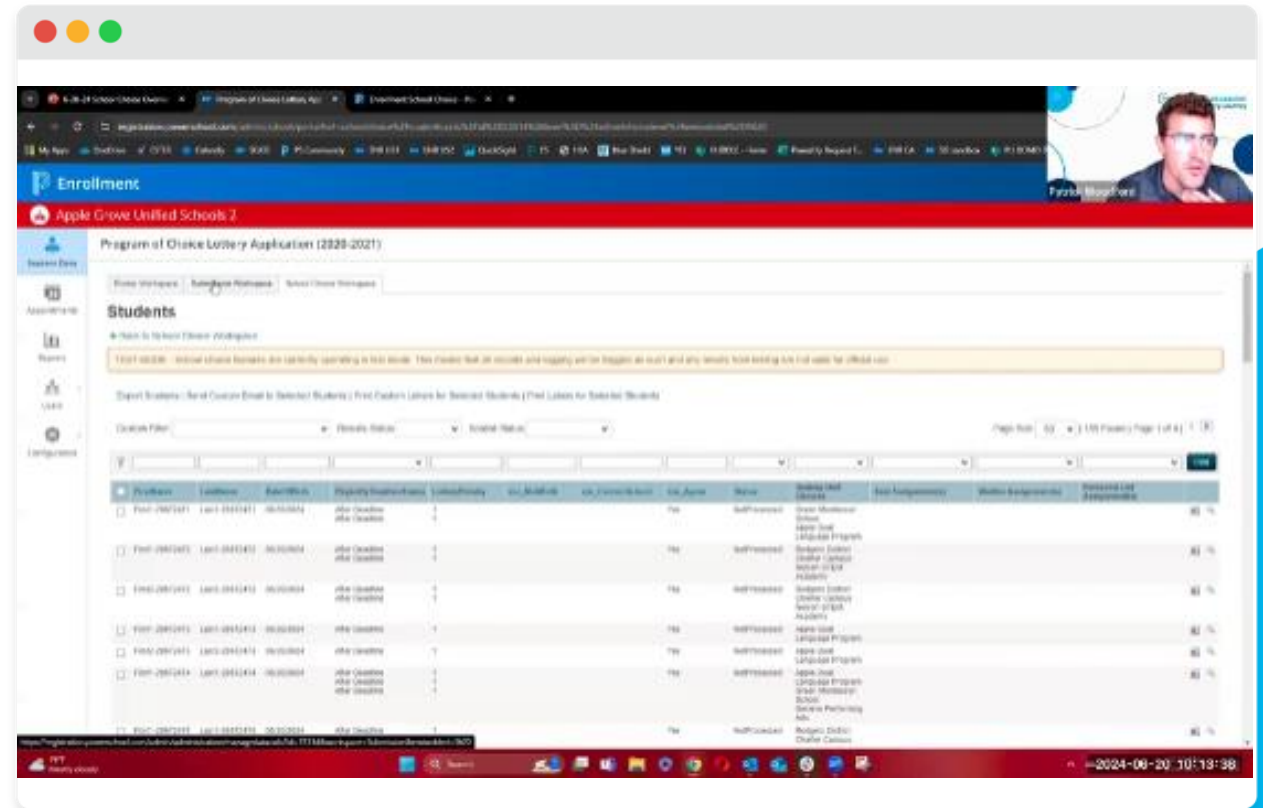
Education Impact Consultant

8/1/24



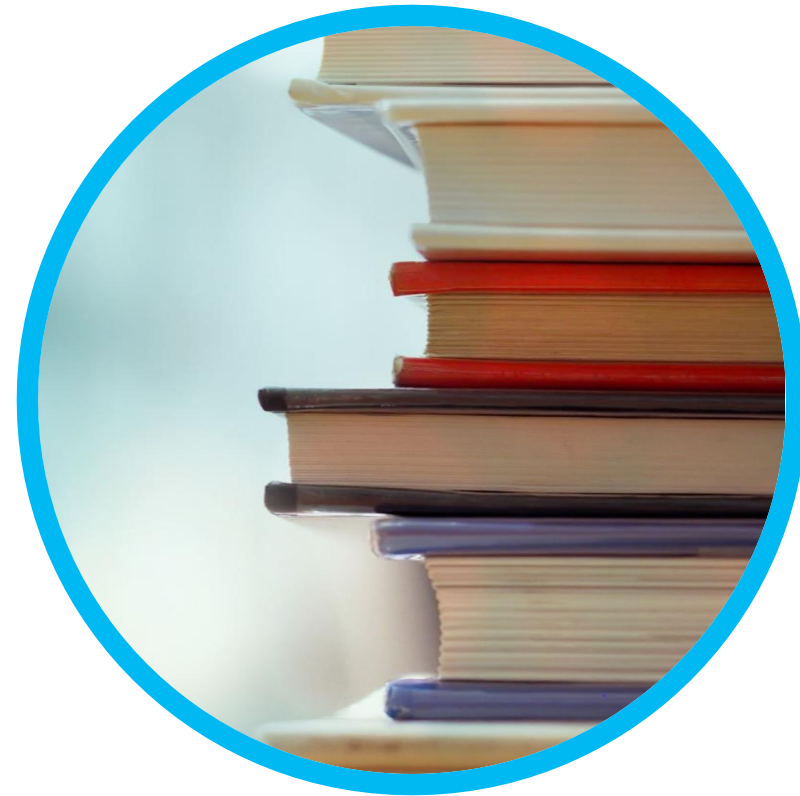
Previously on "PowerSchool PowerUps: Enrollment"...

- **6/20/24**
- [School Choice Overview / Lottery Basics](#)
- [Register Now for Enrollment PowerUps - 2024](#)



Agenda

- 1 Workspace Views
- 2 Workspace Filters
- 3 Workspace Tags
- 4 Product Demo



Default Views Available to you

Pre-Submission (Restricted Form)

- In-Progress

Roster (Private Form)

- All Roster Records
- Unsubmitted
- Imported/Added
- Notified/Not Started
- Started
- Submitted
- On Hold
- Discarded

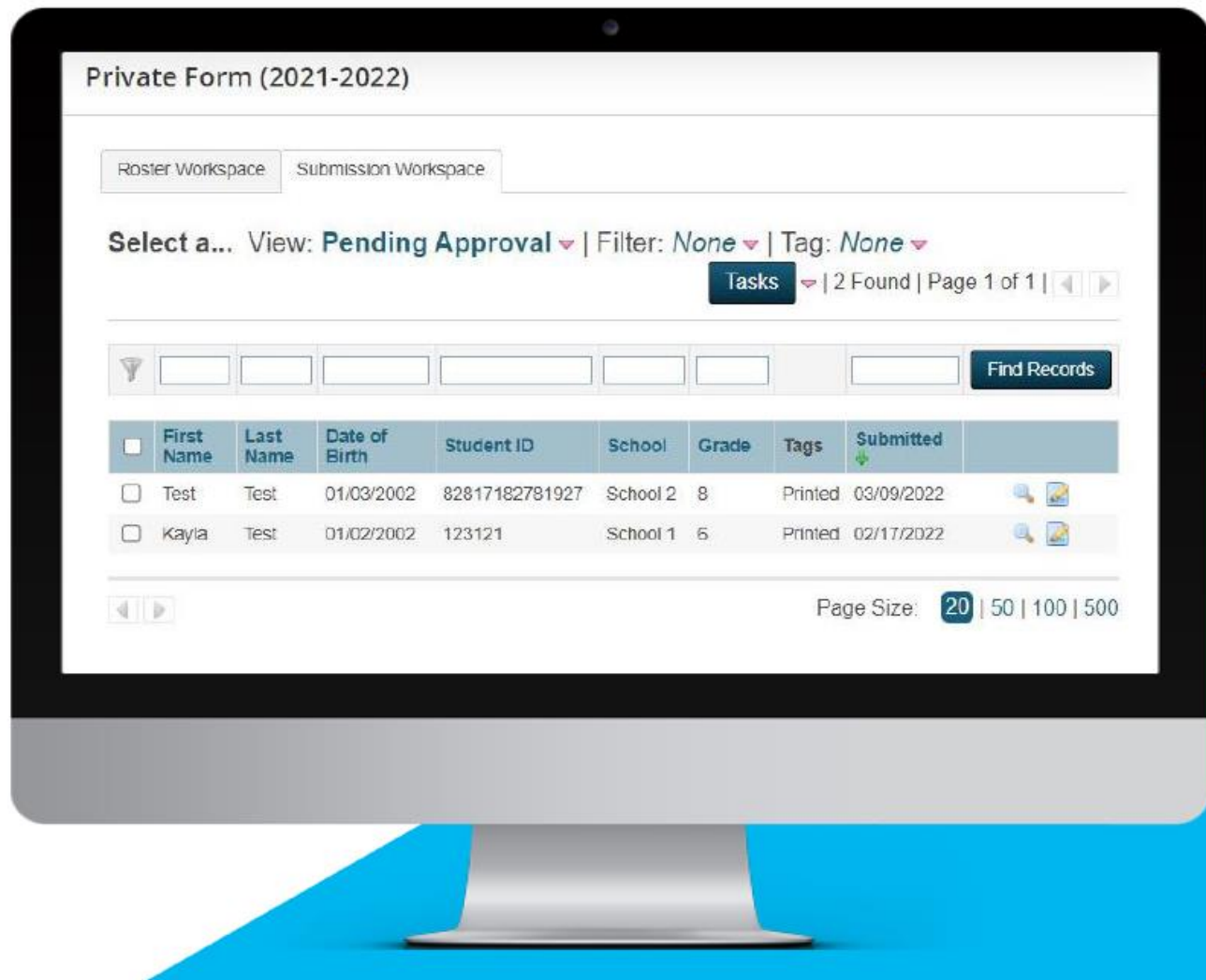
Submission (All)

- Pending Approval
- Approved
- Pending Delivery
- Delivered
- All Submissions
- Discarded

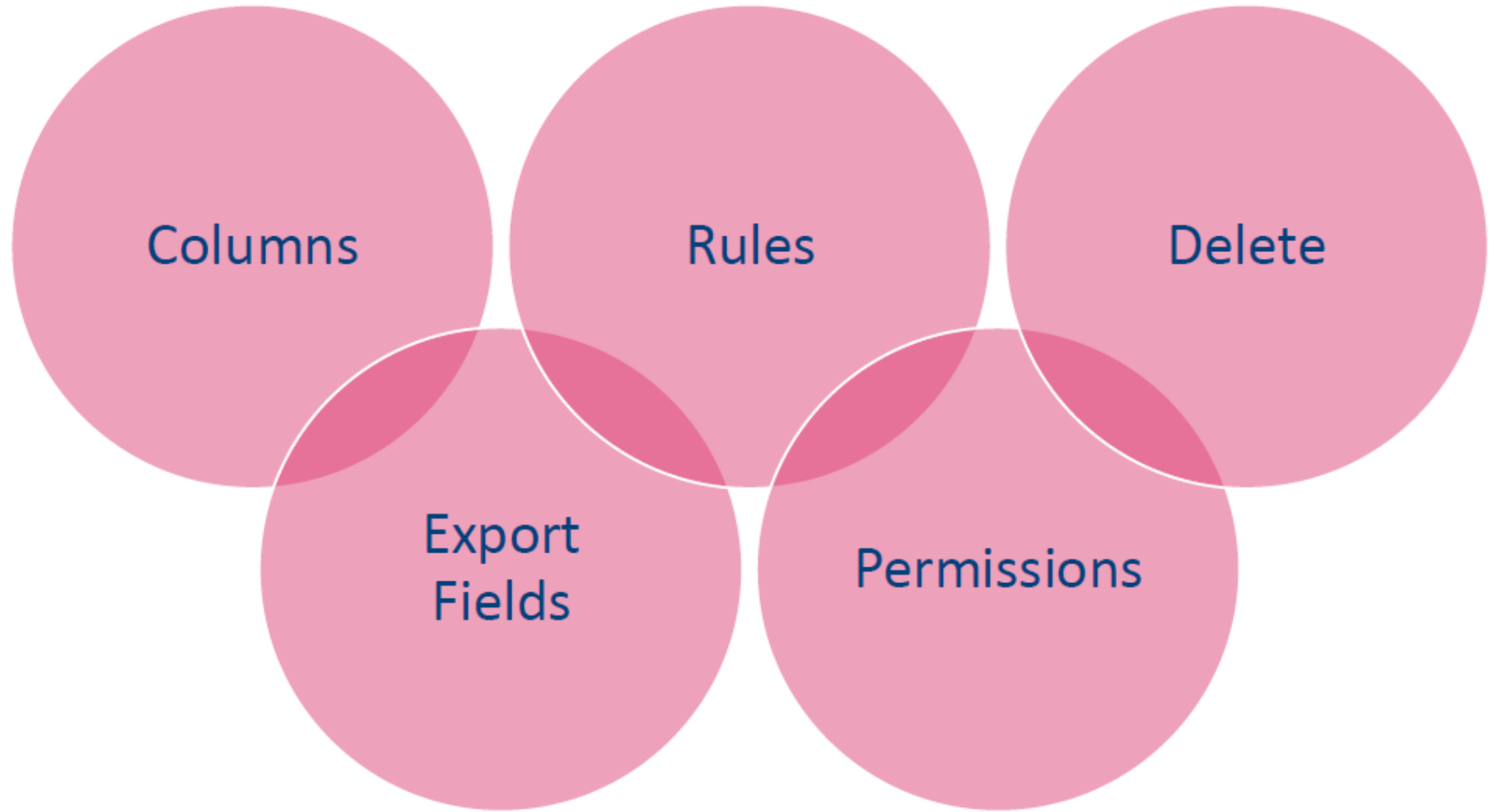
Can you edit the default views?

YES!

You can edit the columns of each view
to include the fields that make sense
for your district



What can you do with a custom view



Why create custom views?



To Save Time

What is a Filter?

Used in workspaces to narrow down records you see in the workspace.



How can Filters be used?



Schools



Grades



SPED



Transportation



Medical



Agreements

How to Create & Edit Filters

Click
Configuration

Choose General

Choose the
form

Click Rules

Click Create
Rule

Choose Filter

Fill out the rule
properties

Click Save

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_ProfVacc | |

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

How can Tags be used?



Label based on
record info

Admin Tasks

Approval
Criteria

How to Create & Edit Tags

Click
Configuration

Choose General

Choose the
form

Click the Tags
tab

Choose Roster
or Submission

Click Create Tag

Fill out the tag
properties

Click Save