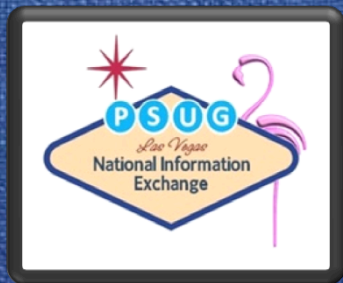
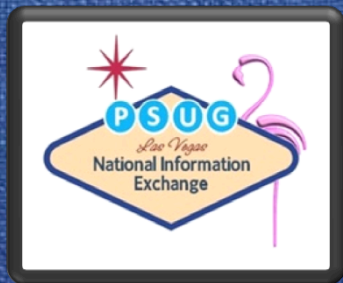


PSUG National Information Exchange

Users helping users



Using ReportWorks



Sioux Falls George
Trainer/Consultant

Agenda




- Objectives
- Introduction to ReportWorks
- Create a Schedule from a template
- Create Labels, Student List, Cross Tab Reports and Form Letters
- Publish a report
- Export and Import reports




Objectives

Upon completion of today's training you will be able to:

- Explore an existing report template – Student Schedule
 - Create Name Badge labels with a logo
 - Create a list of students with Medical Alerts text
 - Create a Cross Tab Report with Historical Grade counts
 - Create Perfect Attendance certificate using Form Letter and a PDF.
 - Publish a report
 - Print report in PowerSchool
- 

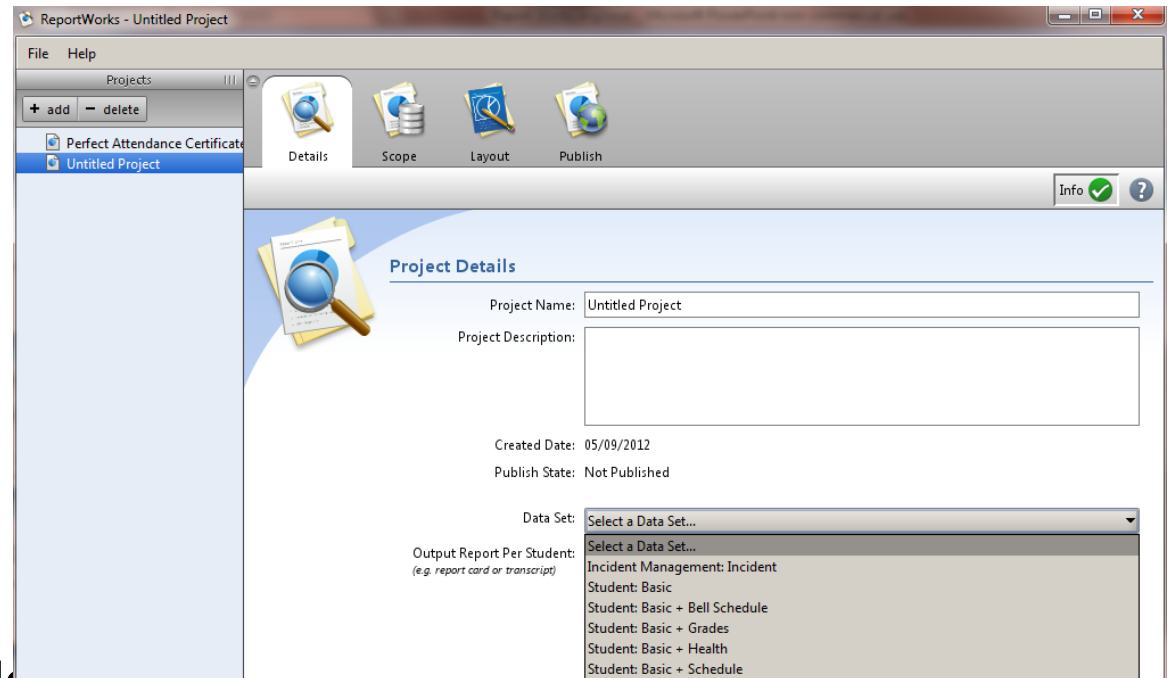


ReportWorks Main features

- Create projects from existing templates.
 - Drag-and-drop interface – no more writing codes
 - Create report templates for other PowerSchool users to run without knowing SQL
 - Generate reports with double-sided printing
 - Drop existing PDF onto report and add data object.
 - Publish for specific schools and user groups.
 - Export and Import templates
 - Fonts, colors, graphs...FUN!
- 

Details Tab

- Title of the report
- Project Description
- Created Date
- Publish State
- Output per Student box
- Choose Data Set
 - Incident Management
 - Student : Basic
 - Student : Basic + Bell Schedule
 - Student : Basic + Grades
 - Student : Basic + Health
 - Student : Basic + Schedule



The screenshot shows the 'ReportWorks - Untitled Project' window. The 'Details' tab is selected in the top navigation bar. The 'Project Details' section contains the following fields:

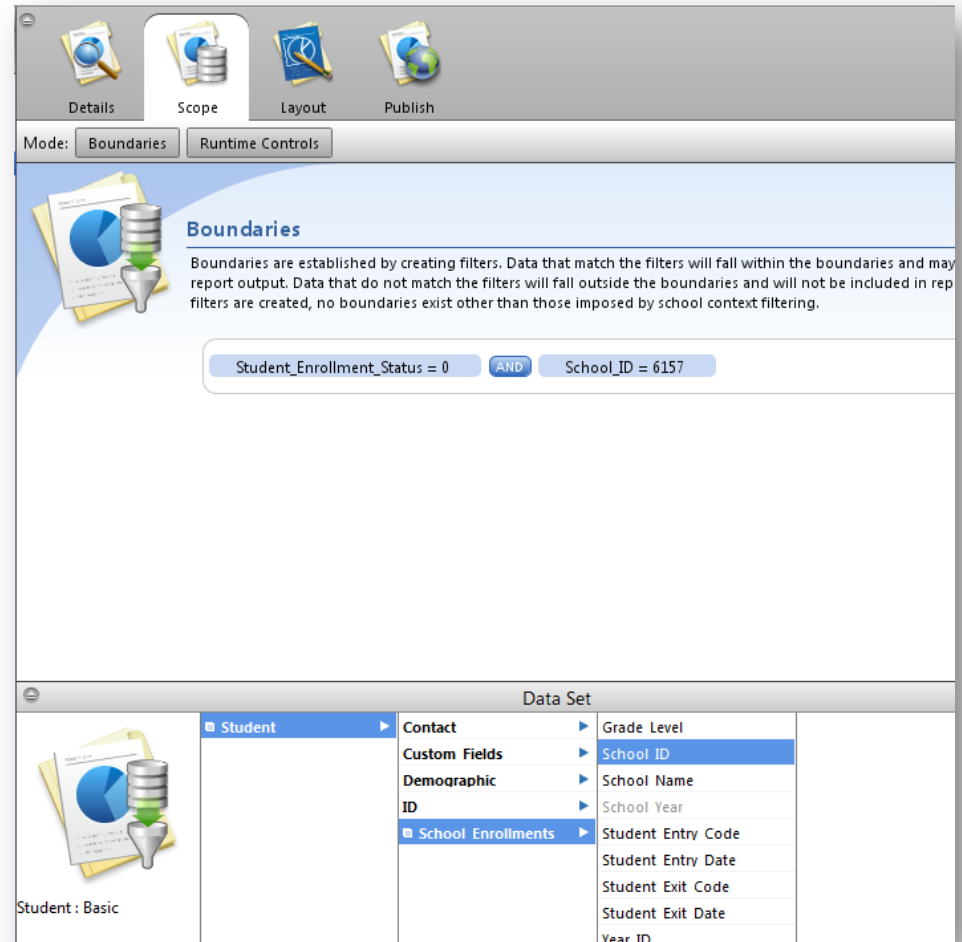
- Project Name:** Untitled Project
- Project Description:** (Empty text box)
- Created Date:** 05/09/2012
- Publish State:** Not Published
- Data Set:** Select a Data Set... (Dropdown menu)
- Output Report Per Student:** Select a Data Set... (Dropdown menu)

The 'Output Report Per Student' dropdown menu is open, showing the following options:

- Incident Management: Incident
- Student: Basic
- Student: Basic + Bell Schedule
- Student: Basic + Grades
- Student: Basic + Health
- Student: Basic + Schedule

Scope Tab

- Boundaries (filters)
- Data Set – data fields
- Runtime Controls – choices for end users



Layout Tab

- Data Structures
- Drag and drop data objects (fields)
- Preview Report
- Inspector Panel
- Fonts

Add a New Data Structure

To organize and display data in your report, you'll need a data structure.

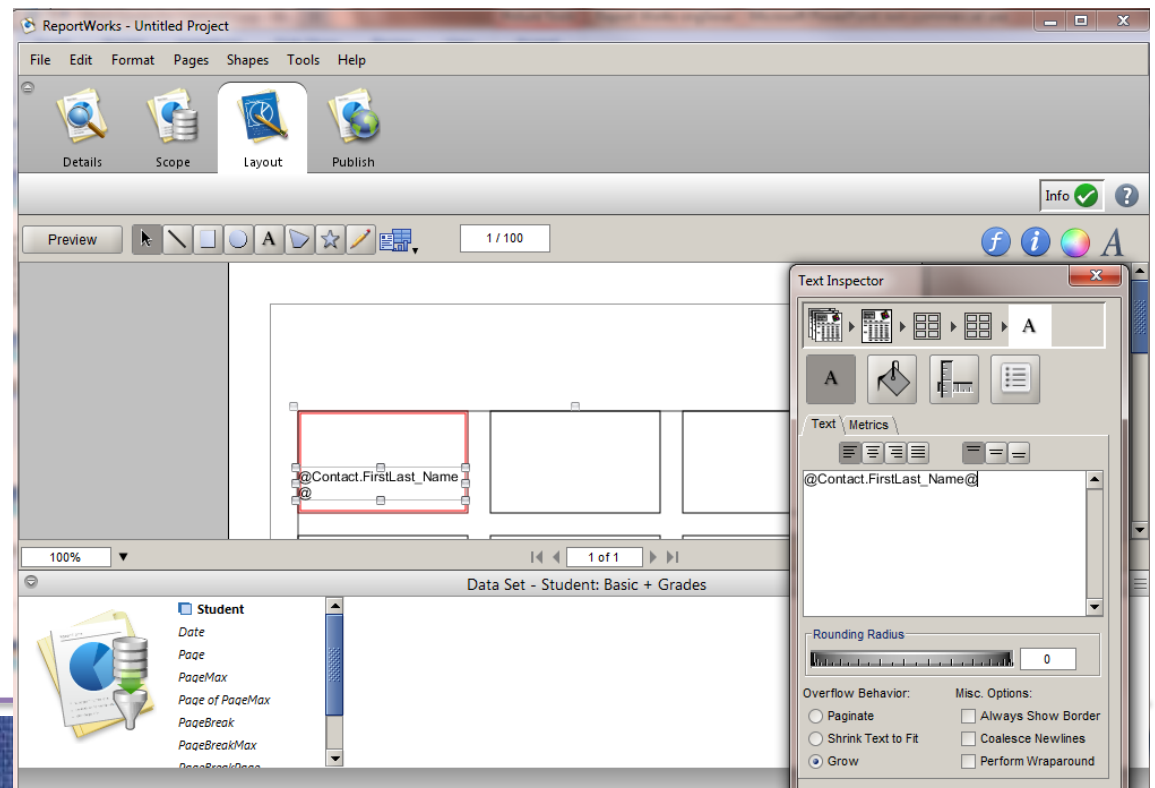
Choose a Data Structure

Table Label Graph CrossTab

TableGrid Attendance TableGrid Form Letter

A table allows you to display rows of like data objects organized by columns. Example: A Class Roster displays the same information for each student.

Choose a Data Subset Student



Publish Tab

- Name the report
- Provide a description
- Select the output type
- Choose the category to appear in PS
- Make the report available to specific user groups and schools
- Publish to PowerSchool

ReportWorks - Untitled Project

File Help

Details Scope Layout Publish

Info ✓ ?

Report Name: Report Card

Report Description:

Output Type: PDF

Application: PowerSchool Administrator Portal

Category: Report Cards - Std Report Cards - Transcripts

School(s):

Unpublished Schools

- Apple Grove High School 2
- Apple Grove High School 3
- Apple Grove High Summer School
- Cherry Hill Middle School
- District Office
- Graduated Students
- Renew School
- Scheduling Feeder School
- Scheduling High School 1
- Scheduling High School 10

Published Schools

- Apple Grove High School 1

Security Groups:

Unpublished Security Groups

- Counselors
- Do not use or modify
- Group 12
- Group 13
- Group 14

Published Security Groups

- Administrator

Unpublish Publish

Publish Tab

- Name the report
- Provide a description
- Select the output type
- Choose the category to appear in PS
- Make the report available to specific user groups and schools
- Publish to PowerSchool

ReportWorks - Untitled Project

File Help

Details Scope Layout Publish

Info ✓ ?

Report Name: Report Card

Report Description:

Output Type: PDF

Application: PowerSchool Administrator Portal

Category: Report Cards - Std Report Cards - Transcripts

School(s):

Unpublished Schools

- Apple Grove High School 2
- Apple Grove High School 3
- Apple Grove High Summer School
- Cherry Hill Middle School
- District Office
- Graduated Students
- Renew School
- Scheduling Feeder School
- Scheduling High School 1
- Scheduling High School 10

Published Schools

- Apple Grove High School 1

Security Groups:

Unpublished Security Groups

- Counselors
- Do not use or modify
- Group 12
- Group 13
- Group 14

Published Security Groups

- Administrator

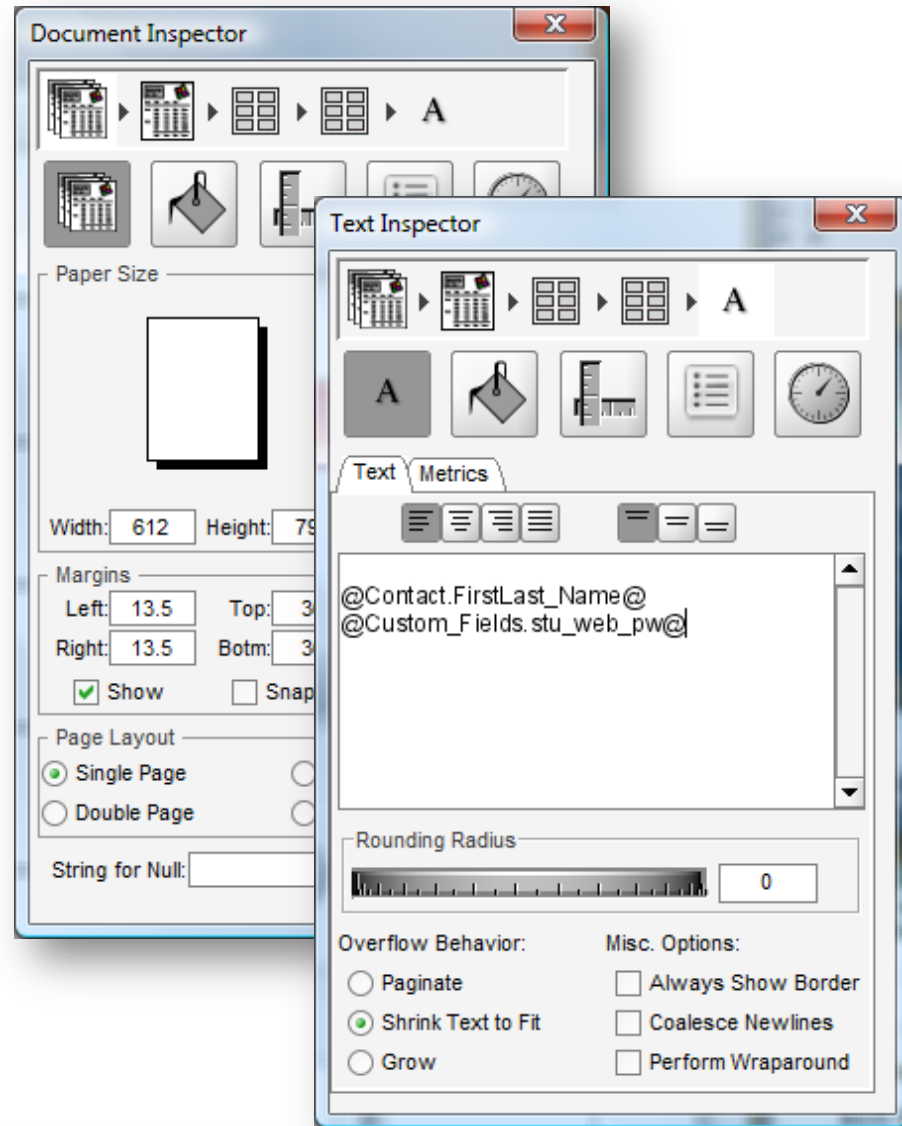
Unpublish Publish

The Inspector and the Panels



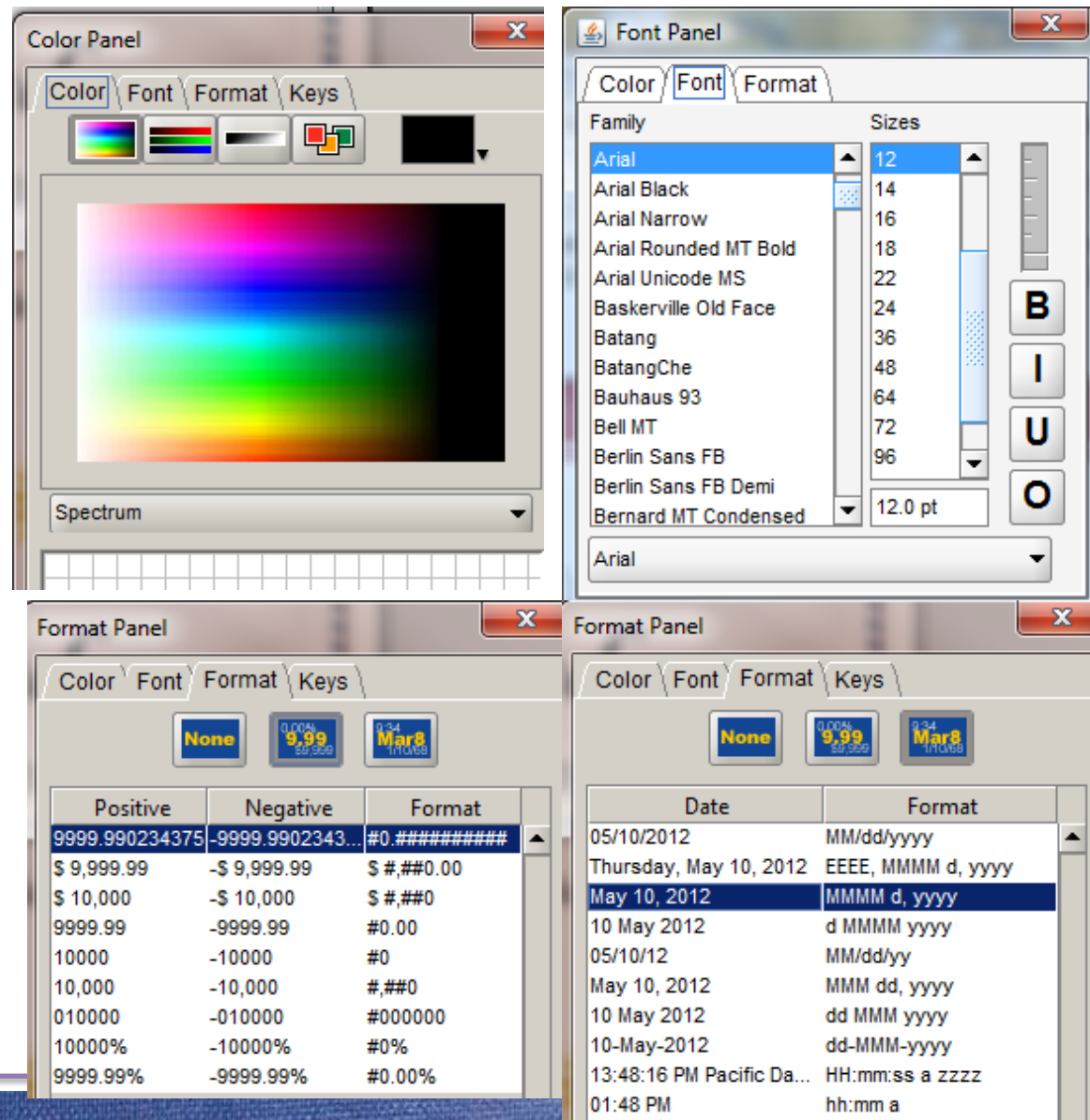
The Inspector

- Changes with the level
 - Document
 - Page
 - Table
 - Table Row
 - Text
 - Paint/Fill



The Panels

- Used in conjunction with the inspector
- Modify
 - Color
 - Font
 - Format of dates and numbers

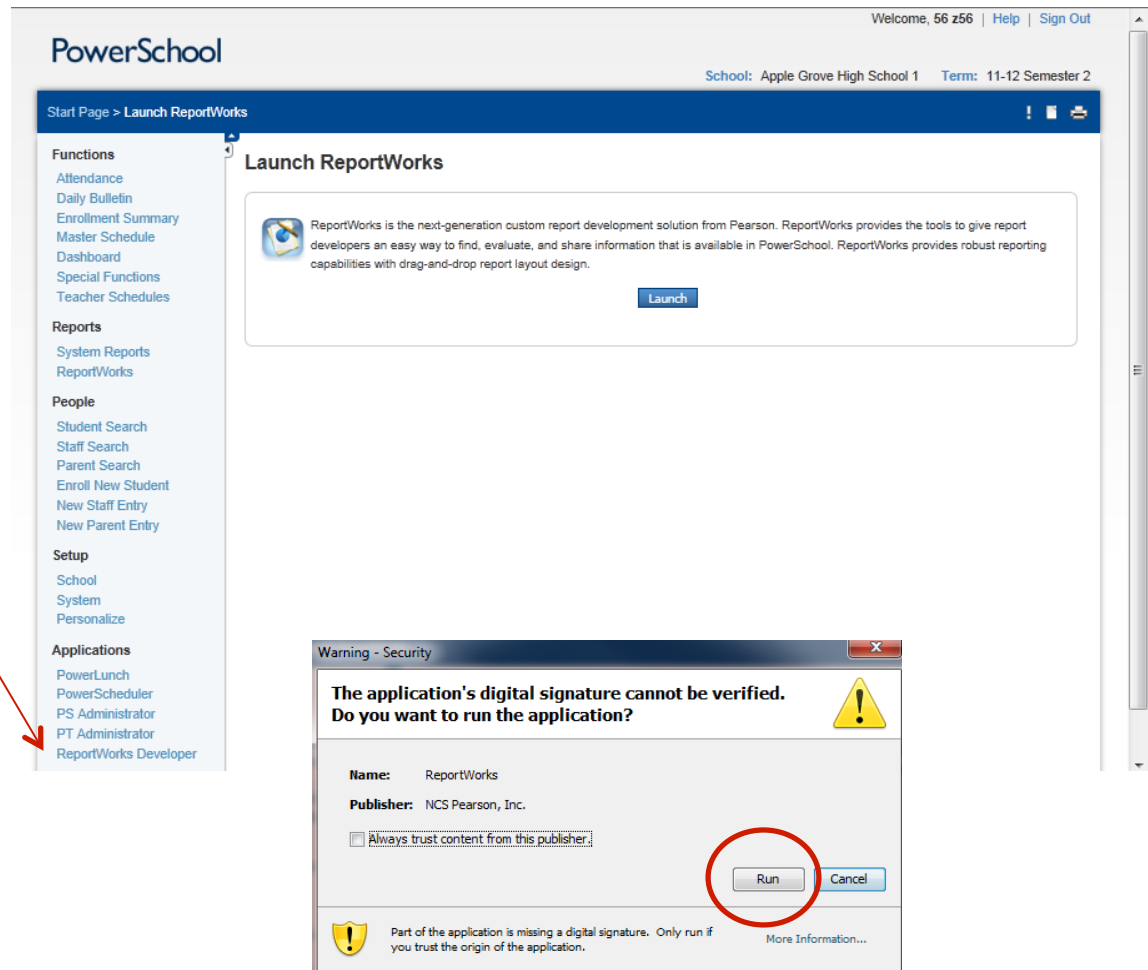


Getting Started



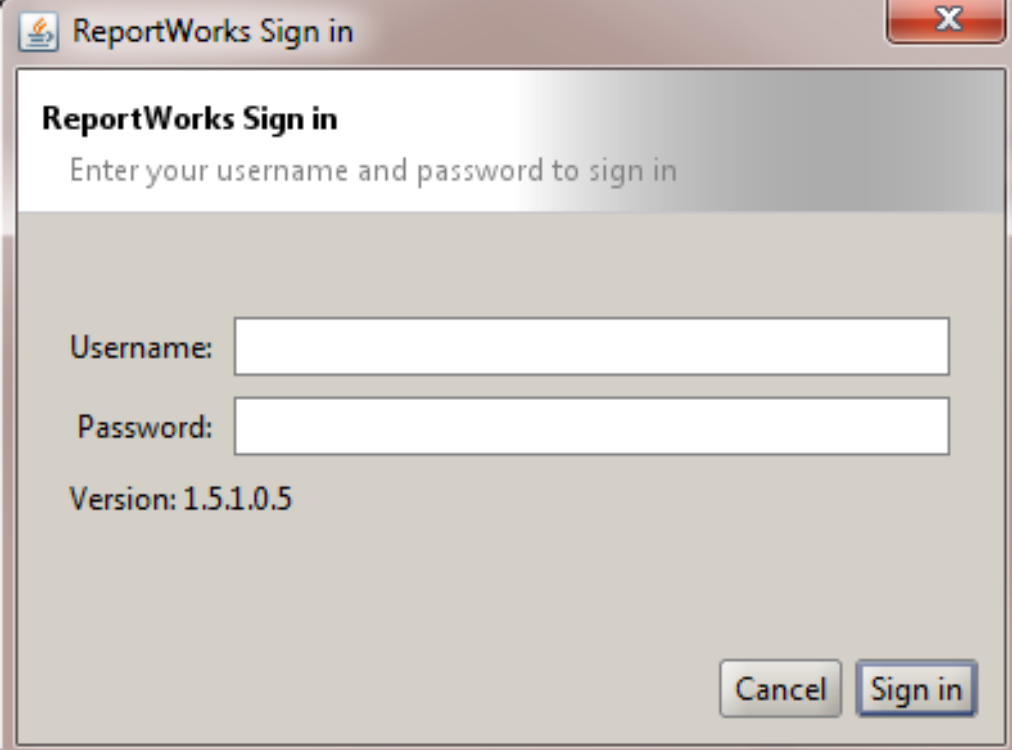
ReportWorks Developer

- At the very bottom of the Start Page Menu
- Click Launch
- Click Run
- Separate Java™ application



Login required

- PowerSchool Username and Password
- System Security setting for “ReportWorks Developer user?” must be set to Yes.



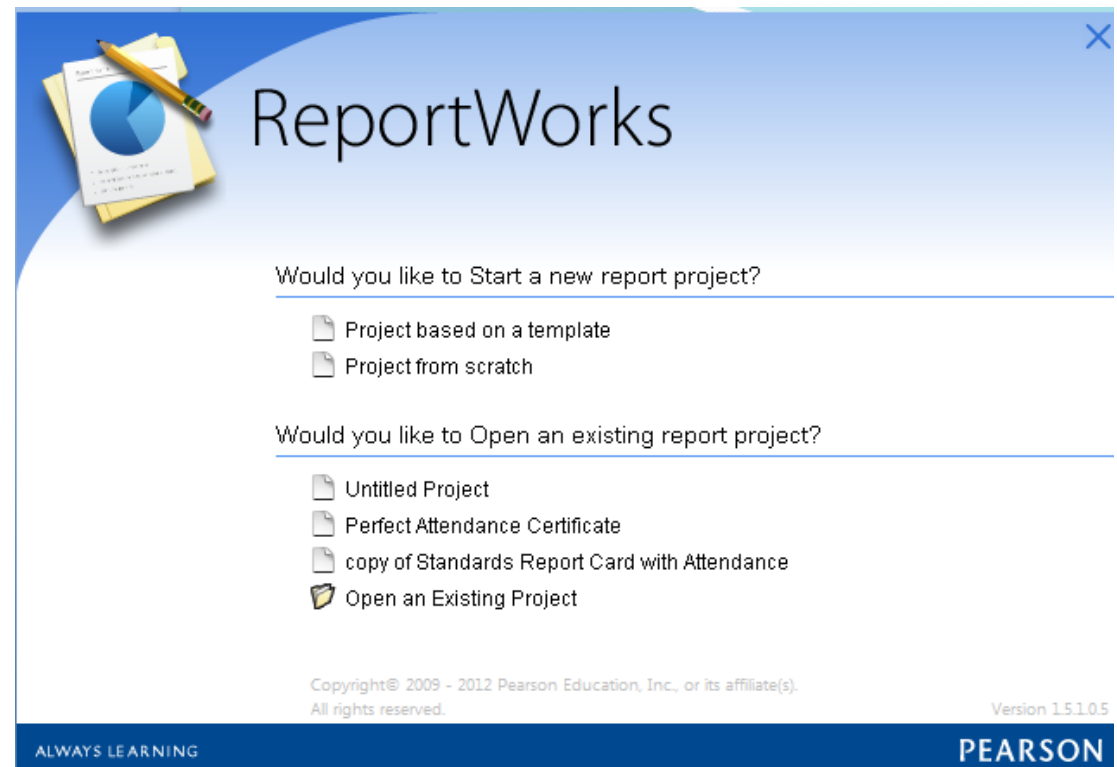
A screenshot of a Windows-style dialog box titled "ReportWorks Sign in". The dialog has a standard title bar with a close button (X). Inside, the title "ReportWorks Sign in" is displayed above the instruction "Enter your username and password to sign in". There are two input fields: "Username:" and "Password:". Below the password field, the text "Version: 1.5.1.0.5" is shown. At the bottom right, there are two buttons: "Cancel" and "Sign in".

ReportWorks Developer user?

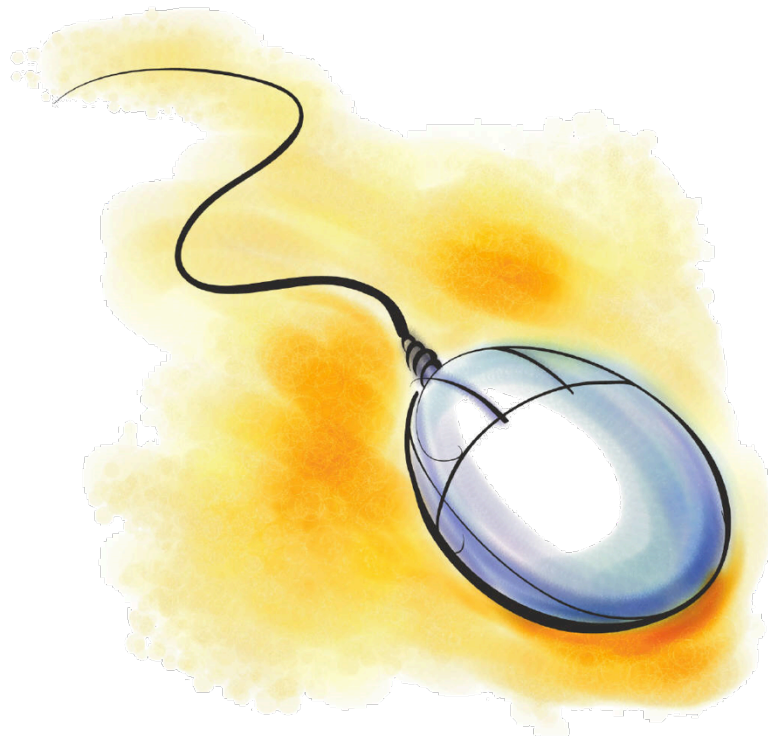
☒ Yes ☐ No

From Template, From Scratch or Open Existing

- From Template
 - Good framework
 - Can be revised
- From Scratch
 - Blank slate
- Open existing

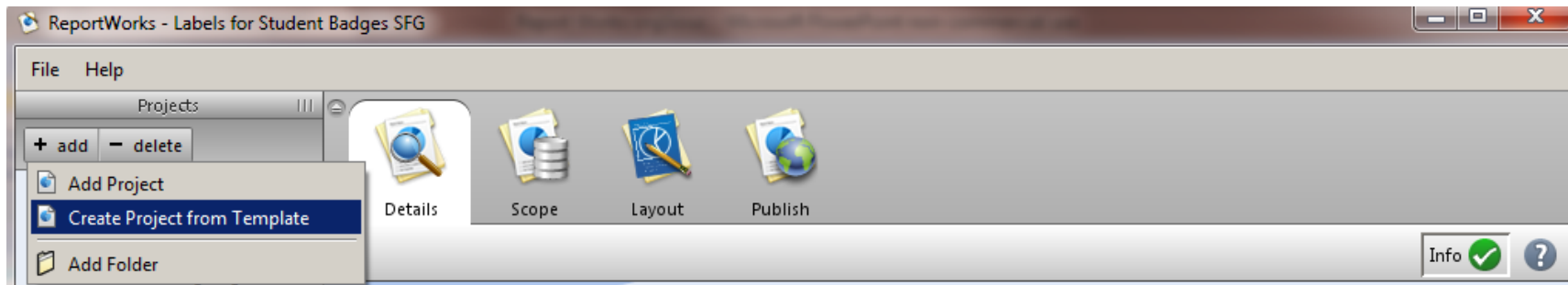


Let's go live . . .



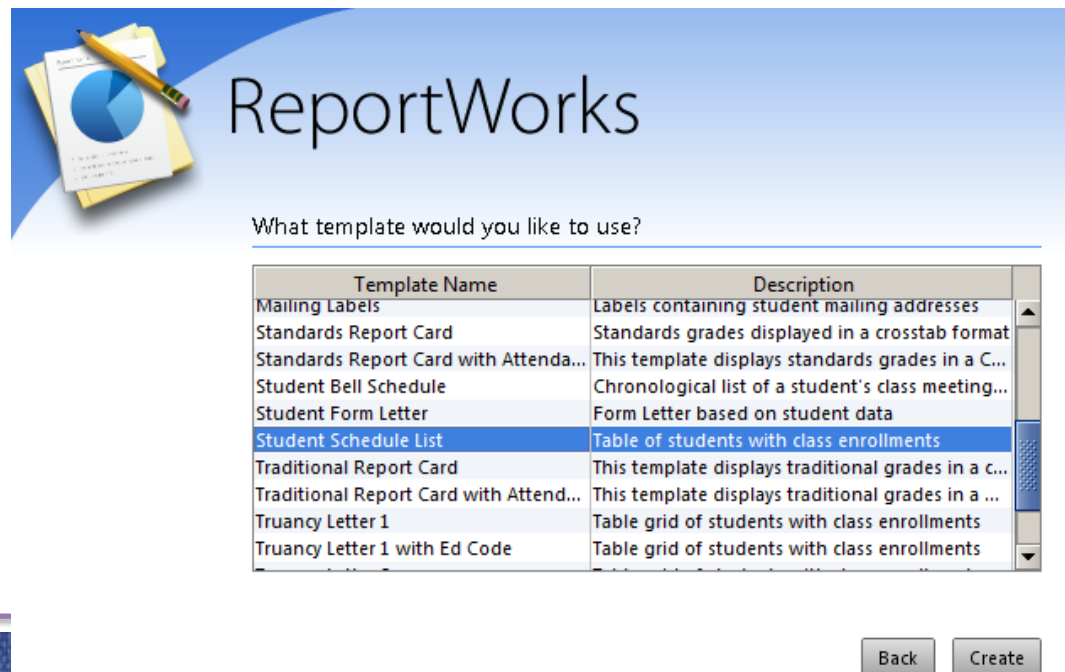
Activity 1 - Creating a Student Schedule from a Template

Create Project from Template



Click **+add** and select
**Create Project from
Template**

From pop-up click
Student Schedule List
Then click **Create**



Details and Boundaries

Note the **Details** are already setup

Check the **Boundaries** for Filters
Student_Enrollment_Status = 0
(means active students)
AND (indicates both)
Note: Year_ID=21 (which is for
2011-12 year)

Project Details

Project Name: copy of Student Schedule List

Project Description: Table of students with class enrollments

Created Date: 05/09/2012

Publish State: Not Published

Data Set: Student: Basic + Schedule

Output Report Per Student: ☐ (e.g. report card or transcript)

ReportWorks - copy of Student Schedule List

File Help

Details Scope Layout Publish

Mode: Boundaries Runtime Controls

Boundaries

Boundaries are established by creating filters. Data that match the filters will fall within the boundaries and may be included in report output. Data that do not match the filters will fall outside the boundaries and will not be included in report output. If no filters are created, no boundaries exist other than those imposed by school context filtering.

Student_Enrollment_Status = 0 AND Year_ID = 21

Layout – click Preview

Apple Grove High School 1 2011-2012 Schedule

Brandon Adair

Enrolled May 30, 2011 to May 26, 2012


Term	Course	Teacher	Room	Meeting Pattern
2011-2012	Current Affairs	Manston, Greg T	123	1(B)
2011-2012	Journalism	Hastings, Jacquelyn V	217	3(B)
2011-2012	Speech	Lura, Colleen R	115	1(A)
Semester 1	Open Media	Accatino, Steve	141	2(A)
Semester 1	Consumer Math	Adams, Mark B	113	4(A-B)
Semester 1	Chamber Singers	Berndt, Gordie E	315	2(B)
Semester 1	Phys Ed 12	Maxedon, Johnathon	LH23	3(A)
Semester 2	Physics	Martin, Gabriel U	112	2(A-B)
Semester 2	French 2	Kyser, Kenneth	209	4(A-B)
Semester 2	Open Study	Accatino, Steve	LL	3(A)

Let's go live . . .




Activity 2 – Create Labels






Labels are a snap with ReportWorks

- Sizes are already defined
 - Easy to add your own logo
 - Preview the labels before printing or saving
- 



By the numbers

- 1 Give your report a title and select a Data Set
 - 2 Limit the data by setting Boundaries (Filters) and Runtime Controls
 - 3 Select Label Data Structure
 - 4 Choose the Avery Product number or Custom
 - 5 Drag and drop the Data elements onto the labels
- 

Start and Name the Project

- From the PowerSchool main menu
 - Click ReportWorks
 - Launch
 - Select Project from scratch
 - Enter name and description
- From the Detail
 - Select the Student :Basic Data set



ReportWorks

Report Project Title: Sample Labels

Report Project Description: 1st labels from scratch

Back Create



Project Details

Project Name: Sample Labels

Project Description: 1st labels from scratch

Publish State: Not Published

Data Set: Student : Basic

1

2

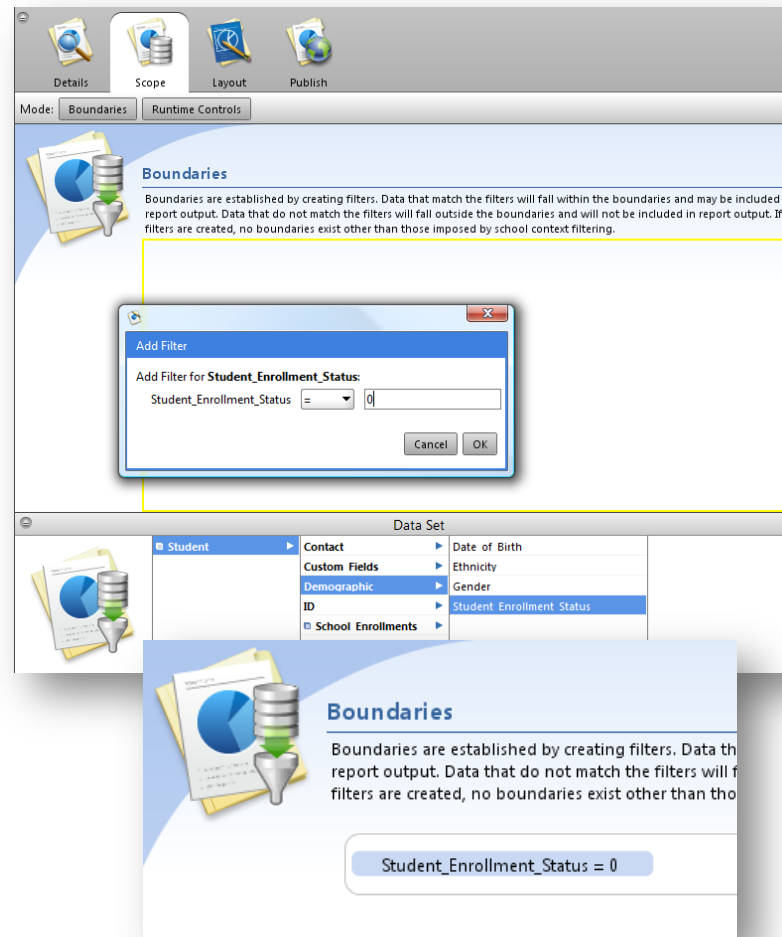
3

4

5

Setting Boundaries

- Boundaries limit or filter the data
- Use Data Set at the bottom to drag field into the boundaries area
- Add the desired filter
- Repeat as necessary noting AND & OR



1

2

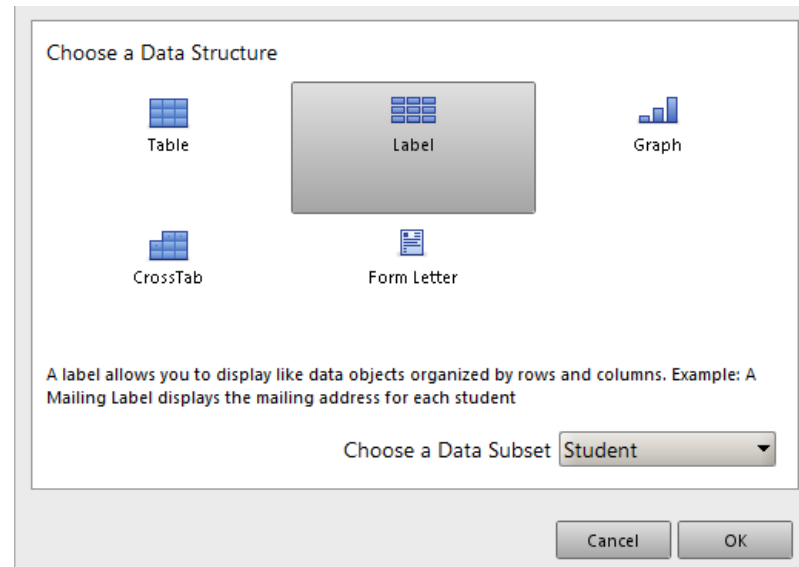
3

4

5

Layout

- Choose a Data Structure
 - Click Label and then OK
- Select Avery Product
 - Select the labels report type



1

2

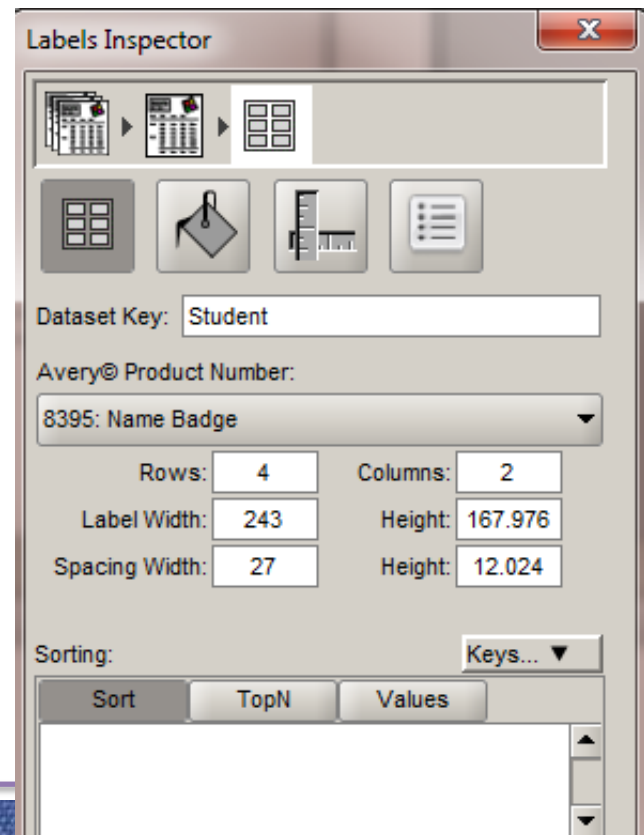
3

4

5

Choose the Label Type

- Open the Labels inspector by clicking the “*i*”
- Under Avery Product number select **8395: Name Badge**



1

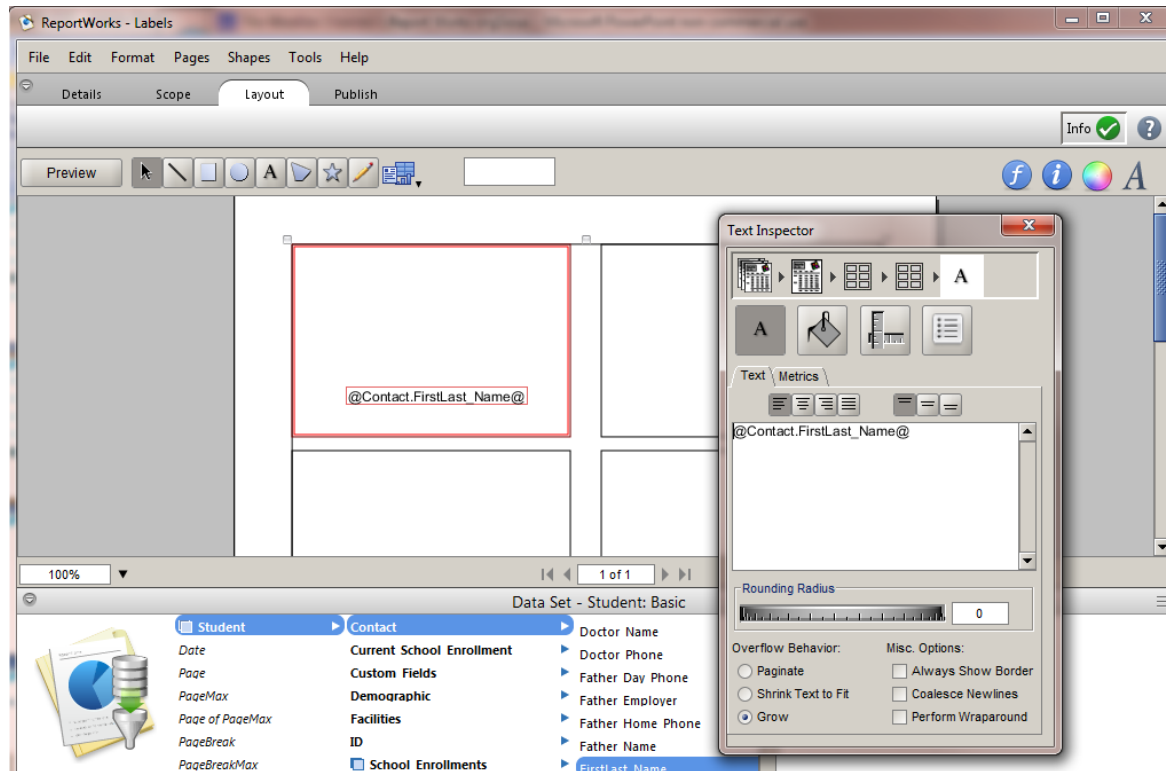
2

3

4

5

Drag and Drop the Data



1

2

3

4

5

- Double-click in the 1st label (upper left)
- Drag Students > Contact > FirstLast Name up
- Open Inspector and highlight, then click on “A” to change font
- Drag the logo above the name and drag corners to resize

Click Preview



Brandon Adair



Corby Adams



Julie Adams



Emmy Ahlberg



Andy Aikinson



Scott Alfonso



Victor Allen



Alfred Allred


Let's go live . . .



Activity 3 – Create Student List – Medical Alerts
Text


Student Lists and Demographic Reports

Name	Medical Alert Text
Brandon Adair	Allergic to peanuts
Corby Adams	Allergic to peanuts
Julie Adams	Allergic to Bee Sting
Emmy Ahlberg	Spleen injured in Rugby. No sports for six months
Andy Aikinson	Allergic to Peanuts
Victor Allen	Allergic to bee stings
Alfred Allred	Diabetic - Insulin available from nurse
Christopher Allred	allergic to homework
Jacee Allred	Prone to seizures
Harold Almanza	Allergic to Peanuts - Contact School Nurse Immediately if ingested
Barry Anderson	Allergic to Peanuts
Cameron Anderson	Allergic to Homework
Cody Anderson	Diabetic
Emily Anderson	Prone to seizures
Jamie Anderson	Allergic to homework!
Jane Anderson	Diabetic - Insulin available from nurse
John Anderson	Allergic to Homework
Sheila Anderson	Takes Ritalin once a day at 12:21
Joshua Andrews	Prone to Asthma attacks - Inhaler should be with him at all times
Jaycee Asleson	Diabetic - Insulin available from nurse

Student Picture																							
	Name: Abbot, Donald		Nickname																				
	ID: 0515583	Grade Level: 11	Yr Grad:																				
	Age: 15 Years, 04 Months	Birth Date: 06/20/1990	Advisor:																				
	Mode to School: Bus	AM Bus: 6	HR Teach																				
	Mode Home: Bus	PM Bus: 6	Homeroom																				
<table border="1"> <thead> <tr> <th>Contact Name</th> <th>Contact Type</th> <th>Primary Phone</th> <th>Cust</th> </tr> </thead> <tbody> <tr> <td>Abbot, Rhonda, Mrs.</td> <td>Parent/Guardian</td> <td>Home, 412-387-6598</td> <td>Y</td> </tr> <tr> <td>Abbot, Don, Mr.</td> <td>Parent</td> <td>Home, 412-387-6598</td> <td>Y</td> </tr> <tr> <td>Abbot, Charles, Mr.</td> <td>Emergency #3</td> <td>Home, 412-387-7829</td> <td>N</td> </tr> <tr> <td>Donnel, Terry, Ms.</td> <td>Emergency #4</td> <td>Home, 412-387-6513</td> <td>N</td> </tr> </tbody> </table>				Contact Name	Contact Type	Primary Phone	Cust	Abbot, Rhonda, Mrs.	Parent/Guardian	Home, 412-387-6598	Y	Abbot, Don, Mr.	Parent	Home, 412-387-6598	Y	Abbot, Charles, Mr.	Emergency #3	Home, 412-387-7829	N	Donnel, Terry, Ms.	Emergency #4	Home, 412-387-6513	N
Contact Name	Contact Type	Primary Phone	Cust																				
Abbot, Rhonda, Mrs.	Parent/Guardian	Home, 412-387-6598	Y																				
Abbot, Don, Mr.	Parent	Home, 412-387-6598	Y																				
Abbot, Charles, Mr.	Emergency #3	Home, 412-387-7829	N																				
Donnel, Terry, Ms.	Emergency #4	Home, 412-387-6513	N																				




Basic Student List

- Use a table to layout the fields
 - Drag the fields into the individual cells
 - Re-size the table to cover the entire page
- 

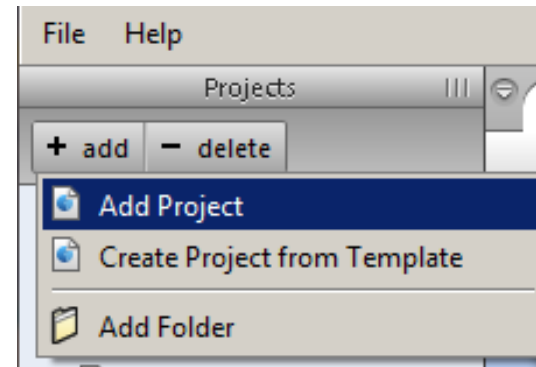


By the numbers

- 1 Add a new project
 - 2 Choose Table
 - 3 Drop the fields into the table
 - 4 Click Standard > Add Alternate
 - 5 Use the color panel ball to change the row color
- 

Add a New Project

- Click “+ add” button and select to Add Project
 - Created as Untitled Project
 - Right click and Load Untitled Project or Double-click to Load
 - Enter name and description
 - Select the Student :Basic + Health Data set

A screenshot of a 'Project Details' form. The title 'Project Details' is at the top in blue. Below it are two input fields: 'Project Name:' with the text 'Medical Alerts Text' and 'Project Description:' with an empty text area. Further down are two labels with values: 'Created Date: 05/09/2012' and 'Publish State: Not Published'. Below these is a 'Data Set:' label with a dropdown menu showing 'Student: Basic + Health'. At the bottom is a checkbox labeled 'Output Report Per Student:' with the text '(e.g. report card or transcript)' below it. The checkbox is currently unchecked.

1

2

3

4

5

Boundaries and Runtime Controls

- Click Student in Data Set. Then click Demographics, then Student Enrollment Status. Drag up to Boundaries and add the zero

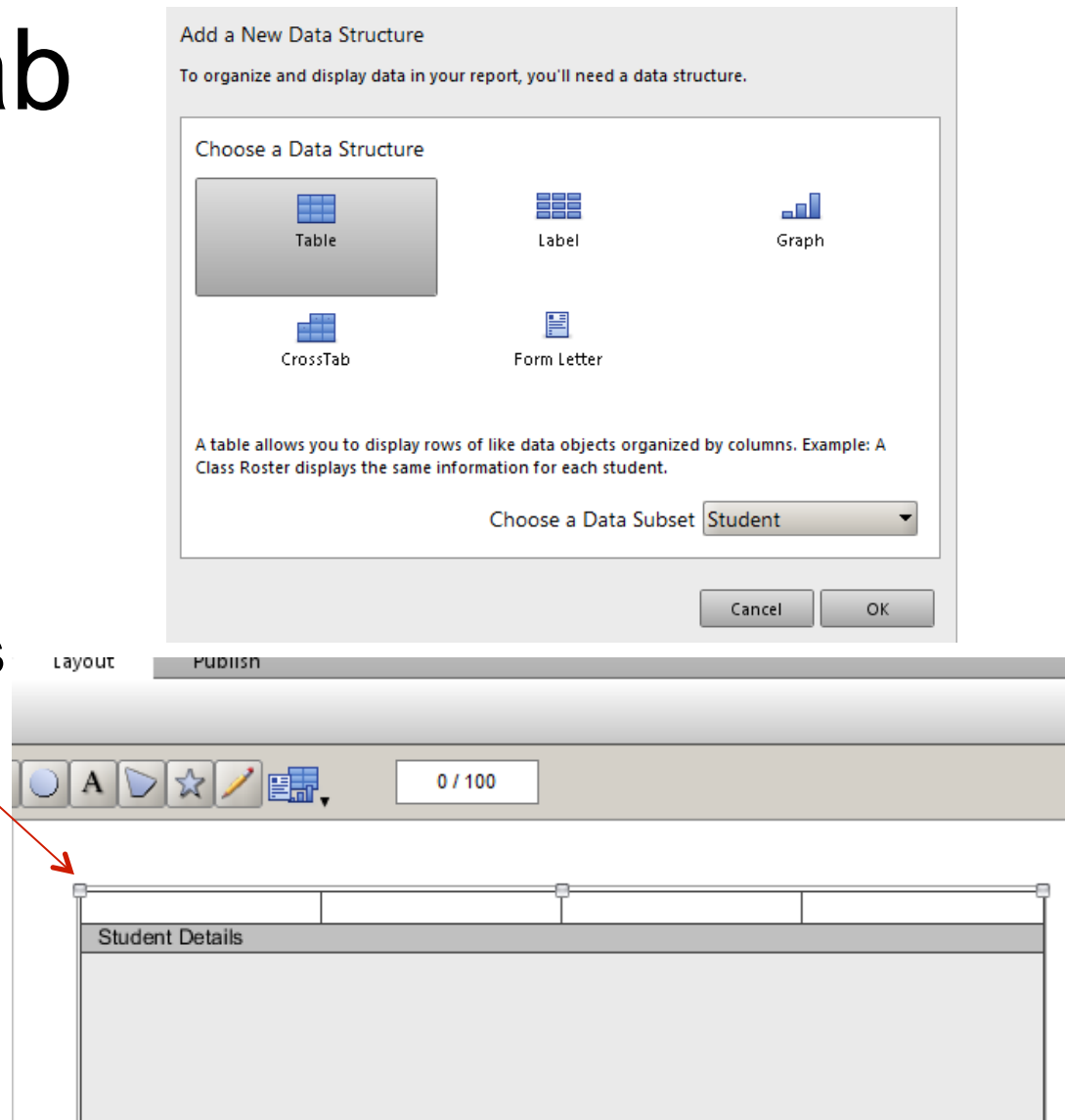


Student_Enrollment_Status = 0

- Click Runtime Controls. Then click the box for **Use of Current Student Selection.**

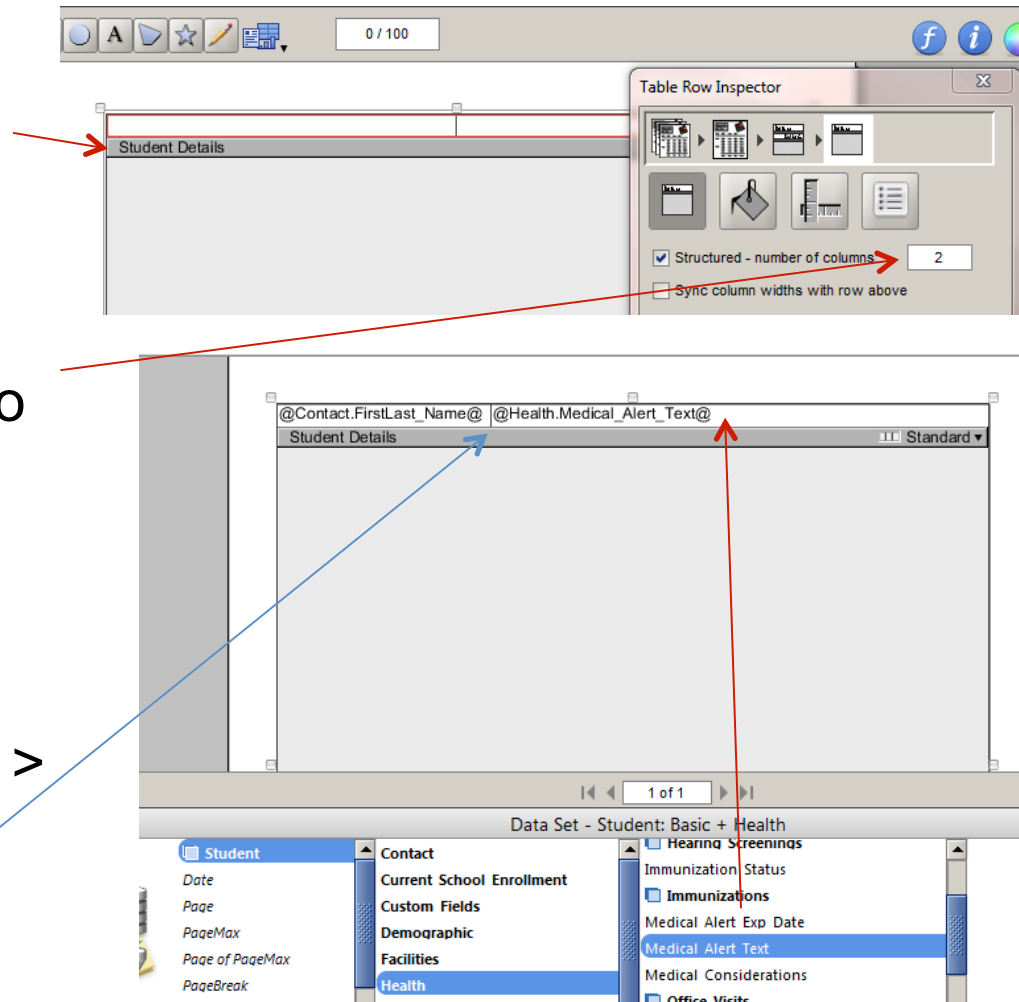
Layout Tab

- Choose Data Structure Table and click OK
- Click on corners of Table to resize to fill the box.



Fields

- Dbl-Click the Student Details bar to get red outline. Click on Inspector “i” and change **Structured – number of columns** to 2
- Drag Students > Contact > **FirstLast Name** into the 1st column
- Drag Students>Health > **Medical Alert Text**
- Adjust column widths



1

2

3

4

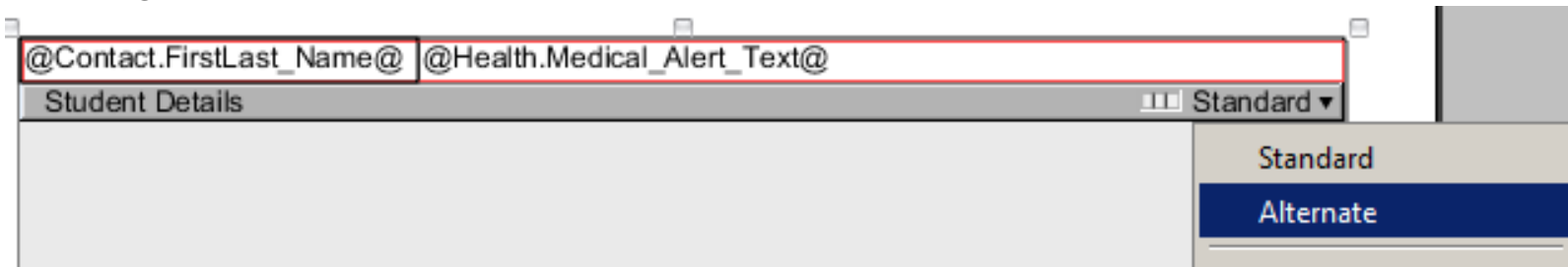
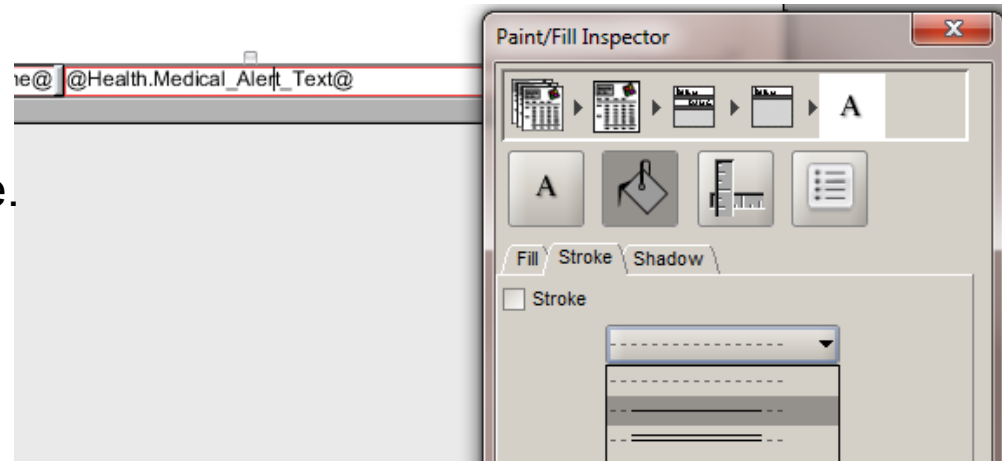
5

Outline Fields & Select Alternate Rows

Click on 1st field to red outline. Click on paint can and Stroke and select a line.

Repeat for 2nd field.

Click on Standard and change to Alternate.



1

2

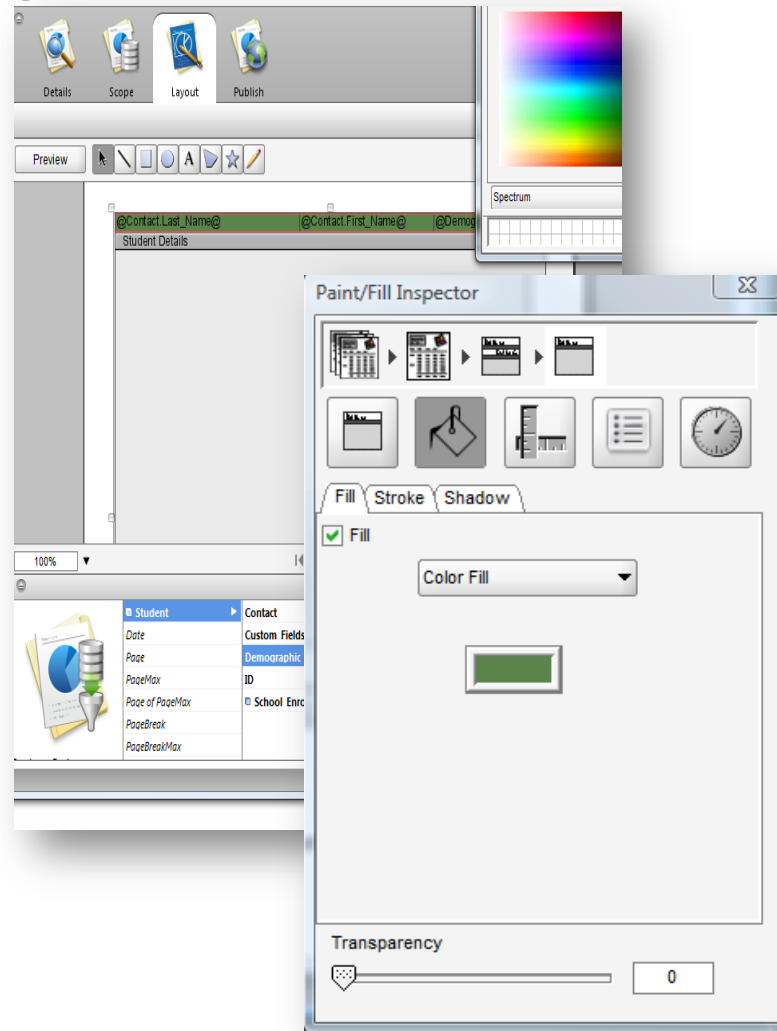
3

4

5

Select Row Colors

- Click Student Details
 - Red box should be around all columns
- In the Table Row Inspector
 - Click the paint can to open the Paint/Fill Inspector or click the Color Panel ball
 - Select the desired color



1

2

3

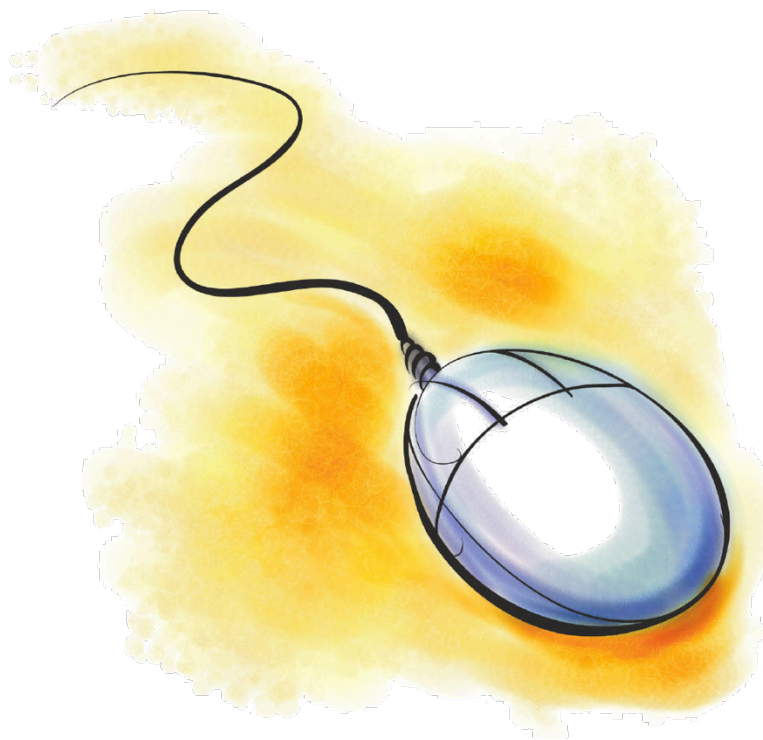
4

5

Preview

Name	Medical Alert Text
Brandon Adair	Allergic to peanuts
Corby Adams	Allergic to peanuts
Julie Adams	Allergic to Bee Sting
Emmy Ahlberg	Spleen injured in Rugby. No sports for six months
Andy Aikinson	Allergic to Peanuts
Victor Allen	Allergic to bee stings
Alfred Allred	Diabetic - Insulin available from nurse
Christopher Allred	allergic to homework
Jacee Allred	Prone to seizures
Harold Almanza	Allergic to Peanuts - Contact School Nurse Immediately if ingested
Barry Anderson	Allergic to Peanuts
Cameron Anderson	Allergic to Homework
Cody Anderson	Diabetic
Emily Anderson	Prone to seizures
Jamie Anderson	Allergic to homework!

Let's go live . . .



Activity 4
Create Cross Tab Report –
Historical Grade Count by Student


Making Information out of Data

- Similar to Pivot Tables
- Counting the numbers of boys vs girls
- Identify which class has the most diverse population
- How many seniors are girls
- Historical Grades Count by student

	@Historical_ ^G
@Student.Contact.Full ^G	@count@

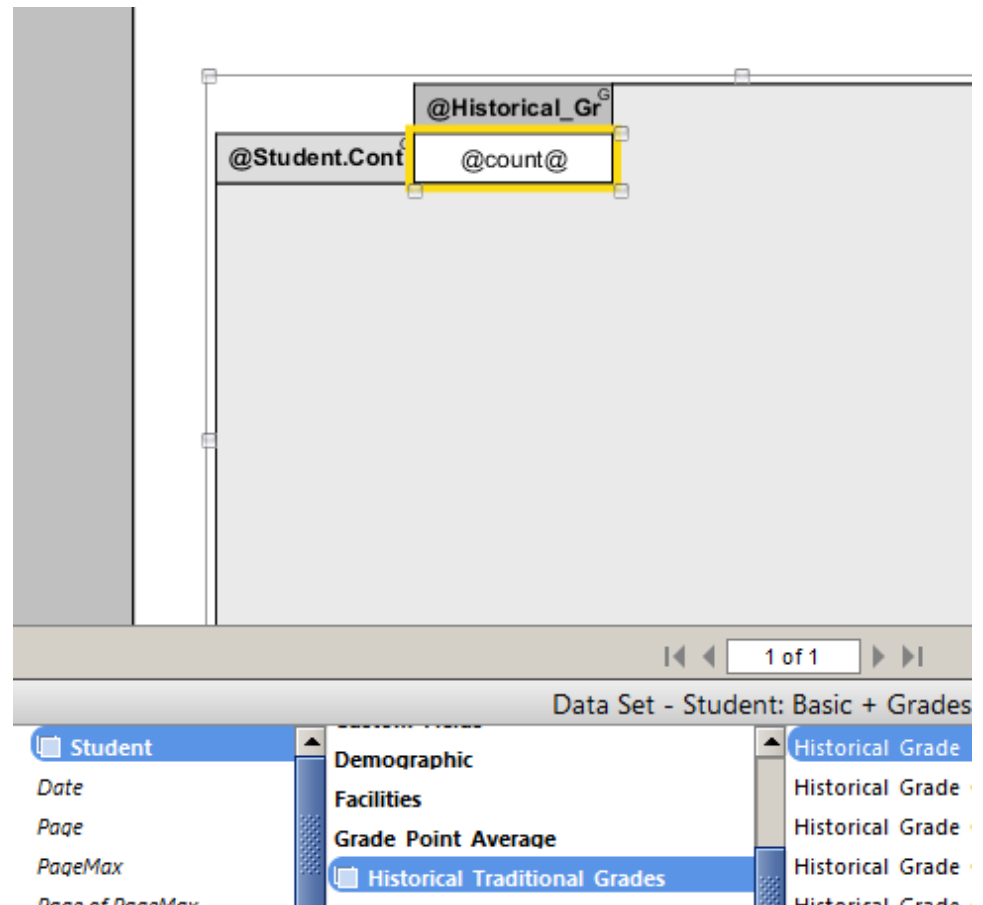


Historical Grades Count by Student

- Add a Project
 - Name and Description
 - Data Set – Student: Basic + Grades
 - Boundaries – Active Students
 - Runtime Controls – Use of Current Student Selection
 - Layout – Add a New Data Structure
 - Select CrossTab
 - Choose a Data Subset –
Historical_Traditional_Grades
 - Click OK
- 

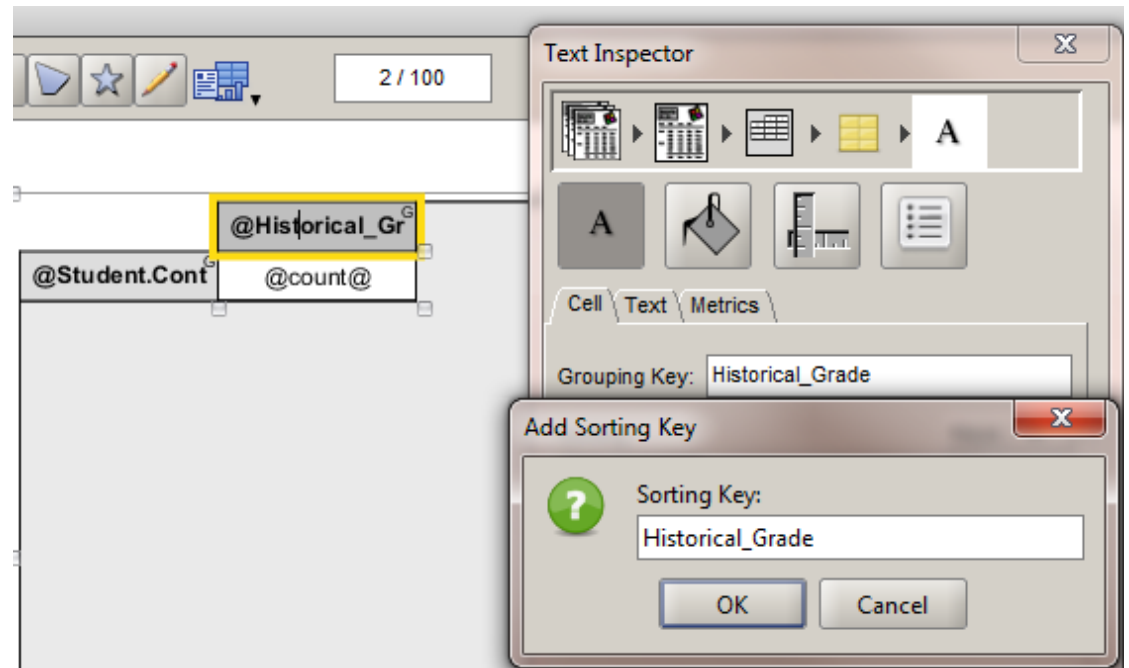
Layout – Add data fields

- Click **Student > Contact > Full Name** and drag to top left cell.
- Click **Student > Historical Traditional Grades > Historical Grade** and drag to top right cell
- Click in remaining cell to outline in yellow – type **@count@**

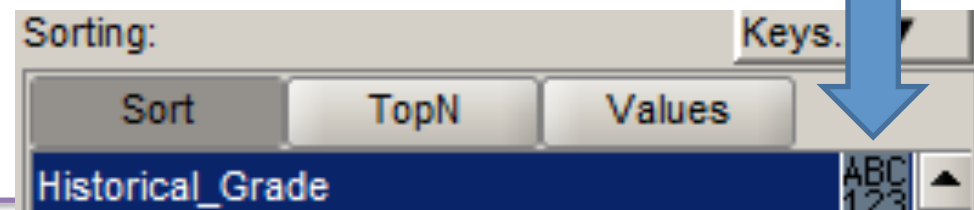


Layout - Sort

- Click on @Historical_Grade@ to outline in yellow
- Click on Inspector “i”
- Click on Keys and select Add...
- Type **Historical_Grade** and click OK



Note ascending/descending icon on the right

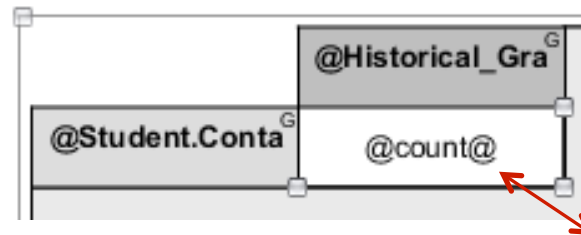


Preview – adjust size - Preview

- Preview
- Drag bottom right corner of cells, down
- Drag right edge of Student cell, right
- Preview

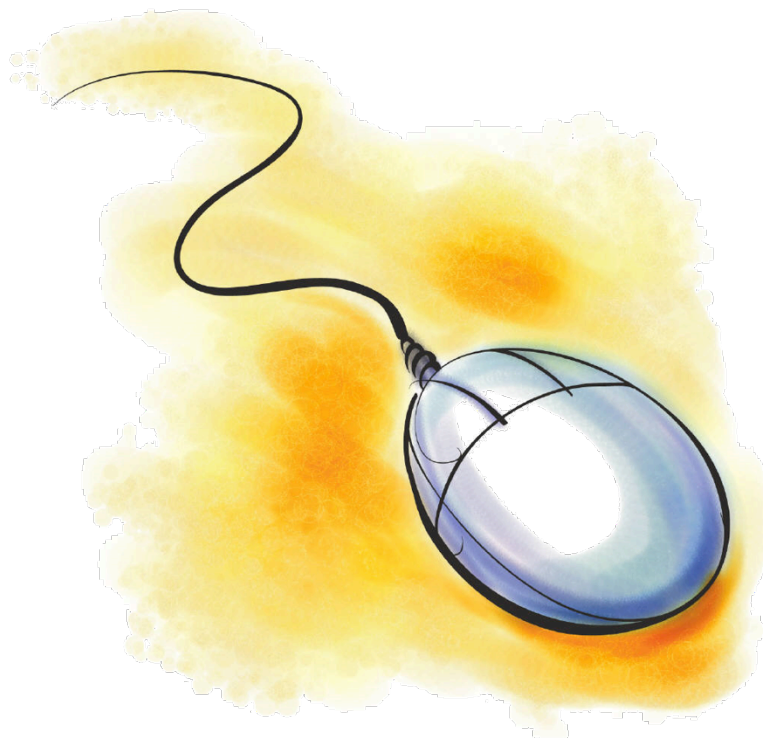
Note complete names and better data placement

	A	A-	B
Adair,	20	7	5
Adams,	6	14	6
Adams,	18	16	6
Ahlberg,	3	11	6
Aikinson,	17	10	12
Alfonso,	5	9	5



	A	A-	B
Adair, Brandon	20	7	5
Adams, Corby	6	14	6
Adams, Julie	18	16	6
Ahlberg, Emmy	3	11	6
Aikinson, Andy	17	10	12

Let's go live . . .

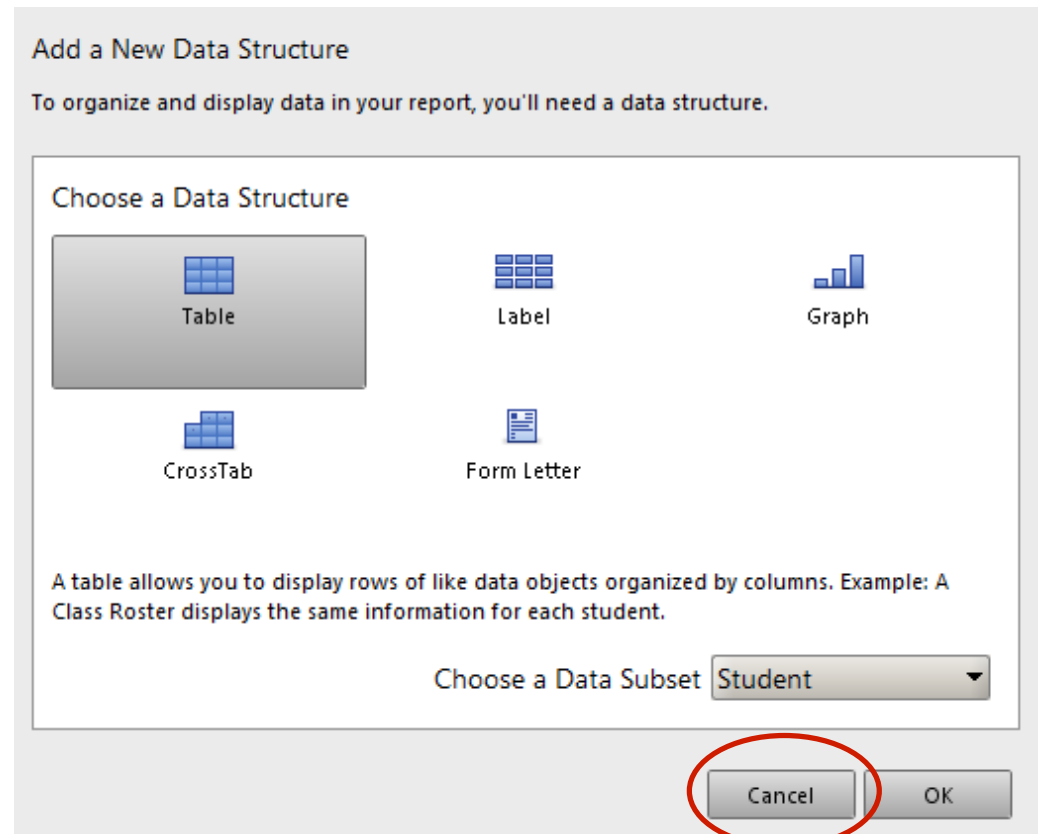


Activity 5

Form Letter – Perfect Attendance Certificate

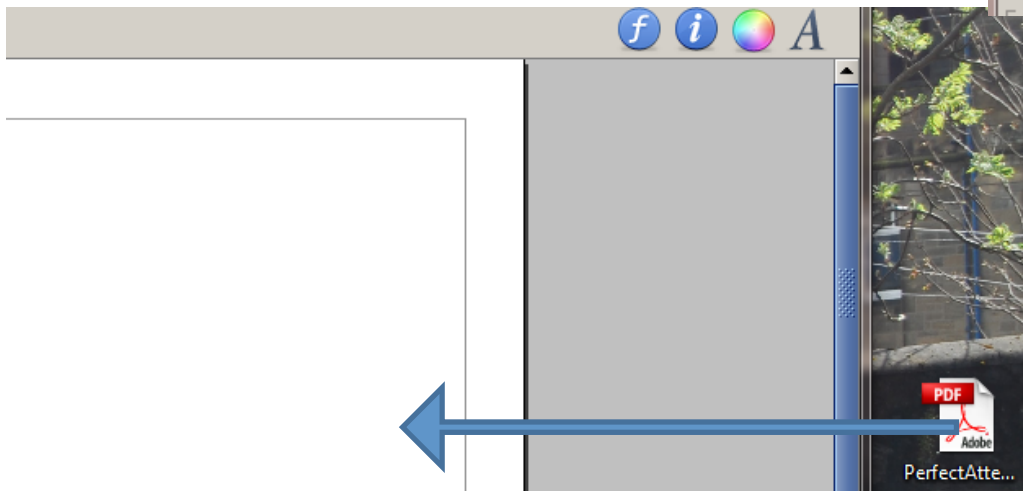
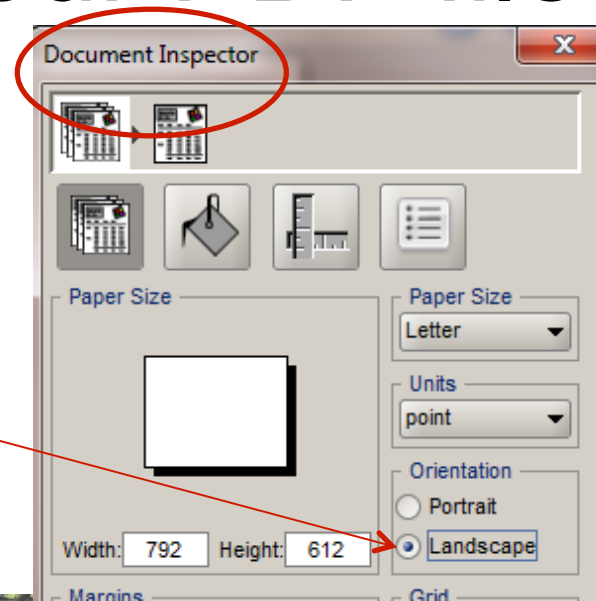
Form Letter – Perfect Attendance Certificate

- Here's your test...
- Details?
- Scope?
- Layout – **Do not select a Data Structure here...click Cancel, instead.**



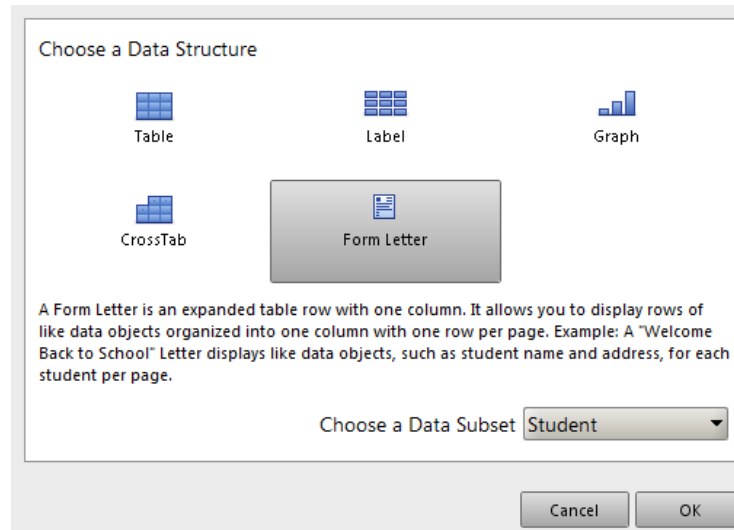
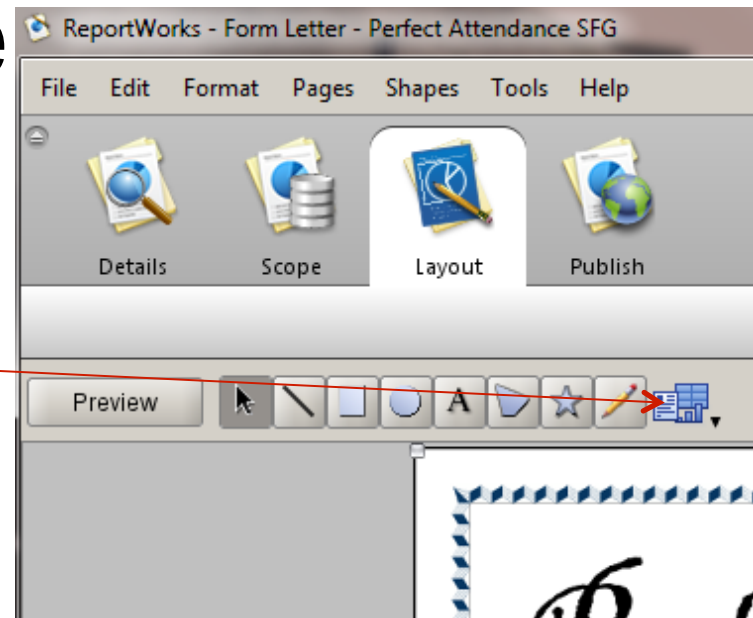
Drag and Drop your PDF file

- Click “**I**”, change Orientation to Landscape
- Drag your PDF onto the blank page.



Add Data Structure

- Click the Data Structure icon
- Select Form Letter
- Click OK



Resize if necessary

- May need to Drag corners to edge of frame

Certificate of

Perfect Attendance

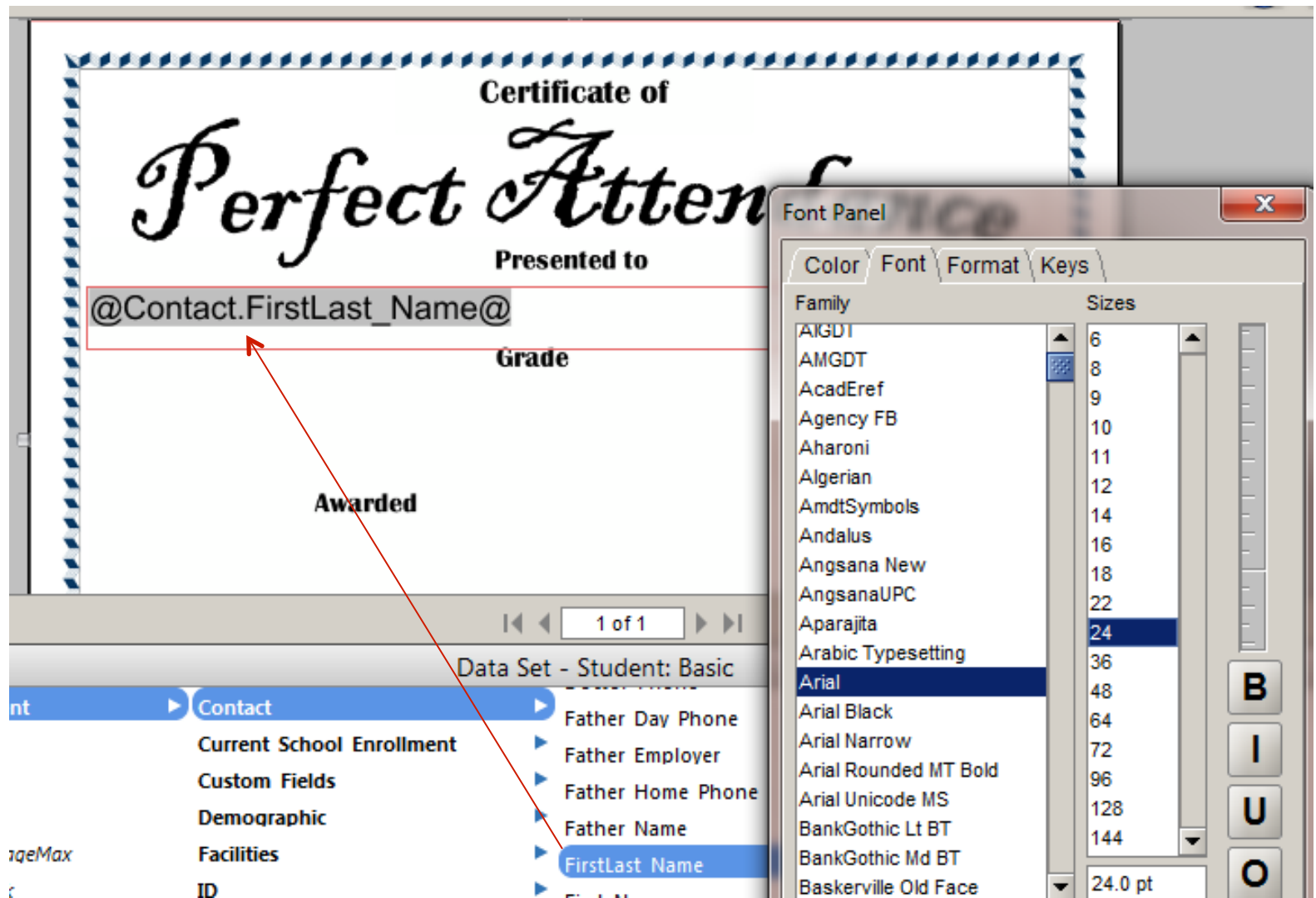
Presented to

Grade

Awarded

Student Details

Drag Data Objects – Highlight and change Fonts

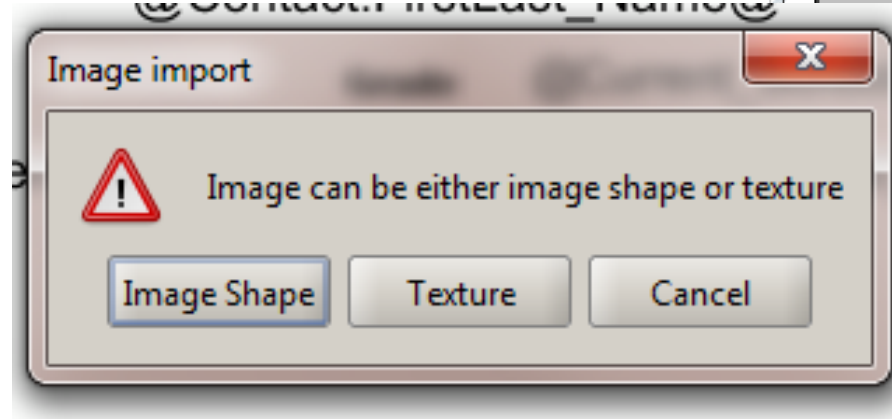


Drag and Drop logo


- Drag & Drop logo



- Click Image Shape



Resize Seal

Certificate of	
<i>Perfect Attendance</i>	
Presented to	
@Contact.FirstLast_Name@	
Grade	@Current_School_Enrollment.
@Current_School_Enrollment.Current_School_Name@	
Awarded	@Date@
<hr/>	
@Current_School_Enrollment.Current_School_Principal_Name @ Principal	
	
Student Details	

Preview



Publish Tab

- Name the report
- Provide a description
- Select the output type
- Choose the category to appear in PS
- Make the report available to specific user groups and schools
- Publish to PowerSchool

ReportWorks - Untitled Project

File Help

Details Scope Layout Publish

Info ✓ ?

Report Name: Report Card

Report Description:

Output Type: PDF

Application: PowerSchool Administrator Portal

Category: Report Cards - Std Report Cards - Transcripts

School(s):

Unpublished Schools

- Apple Grove High School 2
- Apple Grove High School 3
- Apple Grove High Summer School
- Cherry Hill Middle School
- District Office
- Graduated Students
- Renew School
- Scheduling Feeder School
- Scheduling High School 1
- Scheduling High School 10

Published Schools

- Apple Grove High School 1

Security Groups:

Unpublished Security Groups

- Counselors
- Do not use or modify
- Group 12
- Group 13
- Group 14

Published Security Groups

- Administrator

Unpublish Publish

Print Reports in PowerSchool

- Select Students
- Click on ReportWorks
- Click on your Report

The screenshot shows the PowerSchool web interface. At the top, the 'PowerSchool' logo is visible. Below it, a breadcrumb trail reads 'Start Page > Reports > Reports (ReportWorks)'. On the left, a sidebar menu lists 'Functions' (Attendance, Daily Bulletin, Enrollment Summary, Master Schedule, Dashboard, Special Functions, Teacher Schedules) and 'Reports' (System Reports, ReportWorks). The 'ReportWorks' option is highlighted. Below the sidebar, a button labeled 'Run ReportWorks reports' is visible. The main content area is titled 'Reports' and contains tabs for 'System', 'ReportWorks', 'State', 'Engine', and 'Setup'. The 'ReportWorks' tab is active, displaying a table of report cards. The table has two columns: 'Report Cards - Std Report Cards -Transcripts' and 'Description'. It lists three report types: 'Historical Grades Count by Student SFG', 'Standards Report Card', and 'Traditional high school transcript'.

Report Cards - Std Report Cards -Transcripts	Description
Historical Grades Count by Student SFG	
Standards Report Card	Standards grades displayed in
Traditional high school transcript	Traditional high school transcr

Runtime Controls

Historical Grades Count by Student SFG

Report Name	Historical Grades Count by Student SFG
Description	
Category	Report Cards - Std Report Cards -Transcripts
Published Date	05/08/2012 07:08 PM
Select Current Students	<input checked="" type="checkbox"/> 32 students in current selection.

Scheduling

<input checked="" type="radio"/> Run Now
<input type="button" value="Submit"/>

- Make runtime selections, click Run Now and Submit

ReportWorks Report Queue

Report Queue (ReportWorks) - My Jobs

System

ReportWorks

Refresh




Queued Reports

Created On	Report Name	Started	Created By	Status	Options
------------	-------------	---------	------------	--------	---------

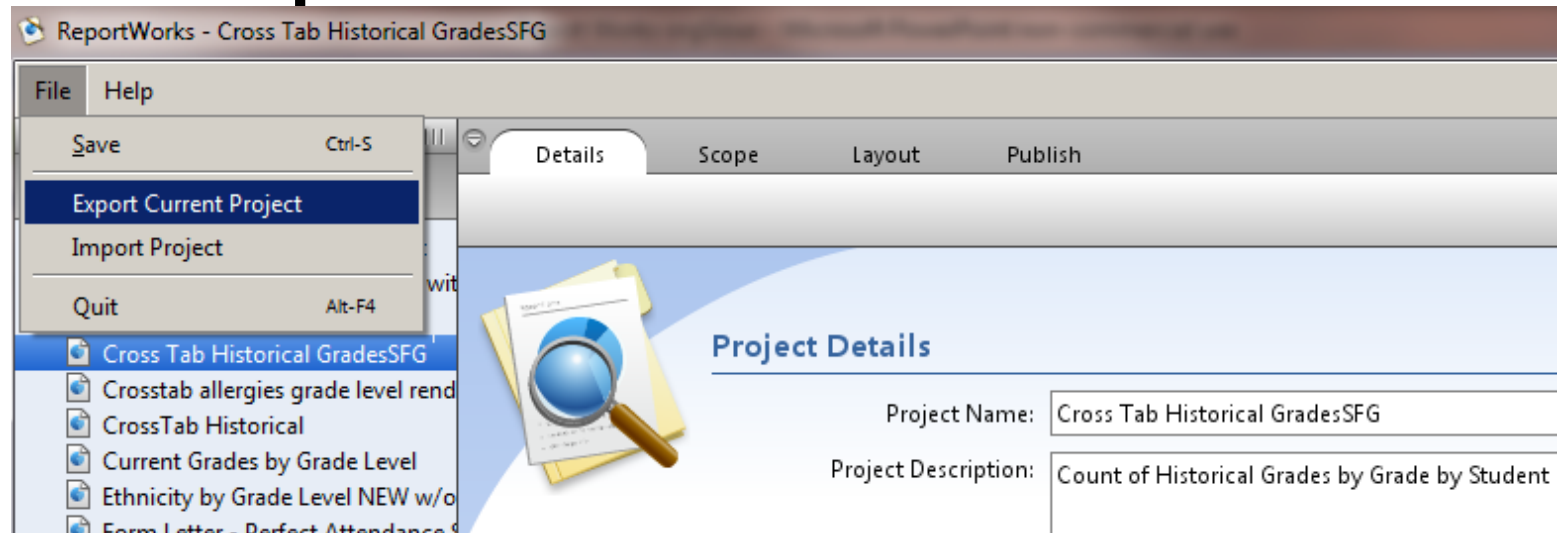
No reports running or pending!

Completed Reports

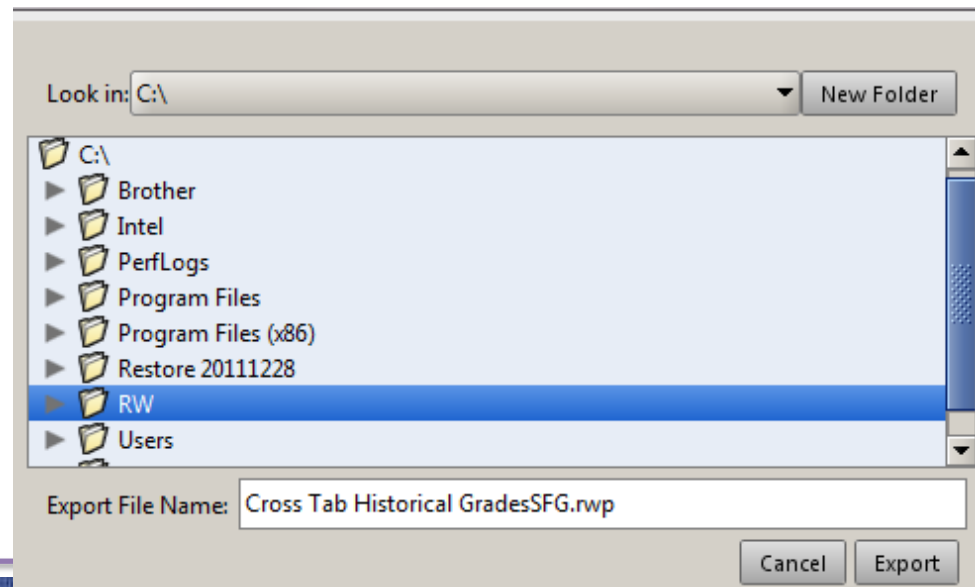
Delete
All

Created On	Report Name	Started	Ended	Created By	Status	Options
05/10/2012	Historical Grades Count by Student SFG	05/10/2012 03:34 PM	05/10/2012 03:34 PM	z56, 56 	Completed	 

Export Report

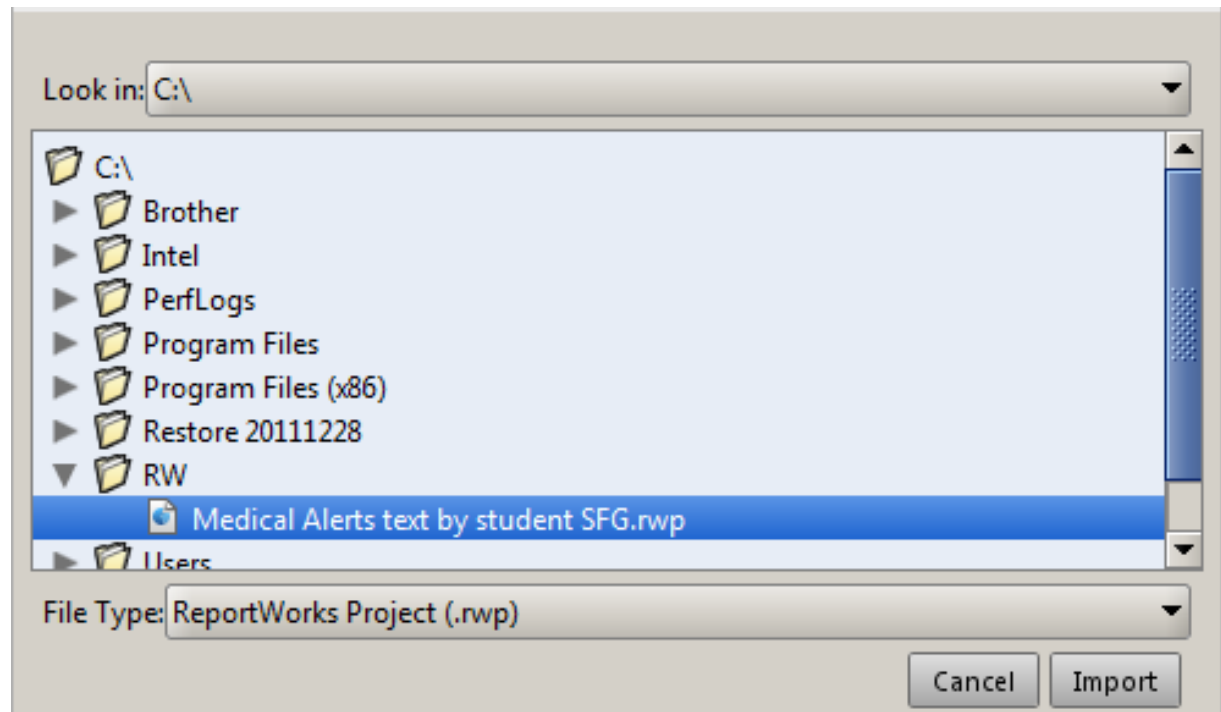
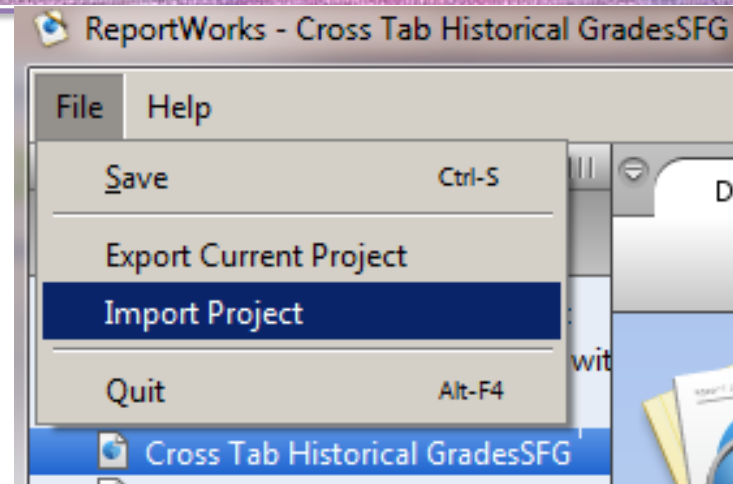


- Export Current Project
- Select or create a new folder
- Export



Import Project

- Find folder with saved projects (extension of .rwp)
- Click
- Import



Summary

You now have the knowledge

- ReportWorks
 - Create from Template
 - Create from Scratch
 - Export and Import
- Scope
- Layout
- Publish
- Print

