

## ReportWorks 1.1

This guide introduces the new features and enhancements released in ReportWorks 1.1, including district-level reporting, additional data sets, and additional graph types, all of which improve data access and design capabilities. New templates and enhancements to report layout functionality provide improved ease-of-use.

### Create Reports

#### Data Sets

Use one of the following data sets to create a report:

- 1. Incident Management: Incident**
  - to report on data stored via Incident Management, including incident attributes, actions, objects, and behavior. Automatic context filtering occurs at runtime to ensure that report users see only incidents to which they have access.
- 2. Student: Basic**
  - to create reports that include student ID, contact, demographic, and school enrollment information.
- 3. Student: Basic + Bell Schedule**
  - to report on student class schedules organized by period and calendar day. A report created with this data set presents information in the same format as a student's bell schedule view in PowerSchool.
- 4. Student: Basic + Schedule**
  - to create reports that include class enrollment, section, course, and student schedule data.

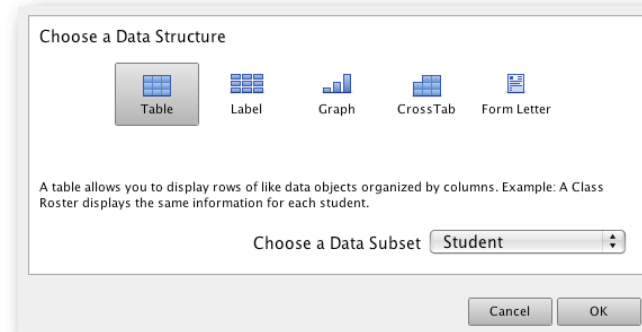
### Types of Reports

ReportWorks 1.1 includes the following report and structure types:

- 1. Table**
  - Use a table to display rows of similar data objects organized by columns. For example, a Class Roster displays the same information for each student.

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- 2. Label**
  - Use a label to display similar data objects organized by rows and columns. For example, a Mailing Label displays the mailing address for each student.
- 3. Graph**
  - Use a graph to visually represent the relationship between two or more data objects. For example, an Ethnicity Gender Distribution Graph displays the number of students by ethnicity and gender in a graph. Graph types include Bar, Horizontal Bar, Area, Line, Scatter, and Pie.
- 4. Cross Tab**
  - Use a cross tab to display the relationship between two or more data objects in a tabular format. For example, an Ethnicity Gender Distribution Report displays the number of students by ethnicity and gender in a table.
- 5. Form Letter**
  - A Form Letter is an expanded table row with one column. Use a Form Letter to display rows of like data objects organized into one column with one row per page. For example, a "Welcome Back to School" letter displays similar data objects, such as student name and address, for each student per page.



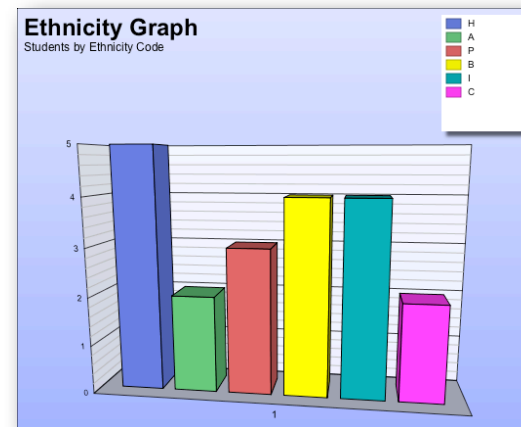
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## Create a Student Ethnicity Graph

To create a bar graph from scratch:

1. After launching ReportWorks, click **Project from scratch** on the ReportWorks start page.
2. Enter a Report Project Title, such as `Student Ethnicity Graph xx`, adding initials to distinguish your report from others.
3. Enter a Report Project Description, such as `Graph of students by ethnicity`.
4. Click **Create**.
5. On the Details page, select the **Student: Basic** data set.
6. Click the **Scope** tab to define the Boundaries.
7. In the Data Set pane, open the **Student** data set, then click **Demographic** to reveal the list of demographic data objects.
8. Drag and drop the **Student\_Enrollment\_Status** data object into the Boundaries pane.
9. On the Add Filter window, leave the comparator set to `=`, enter `0` in the text field, and click **OK**.
10. If needed, define additional Runtime Controls.
11. Click the **Layout** tab.
12. On the Add a New Data Structure window, select **Graph**, and click **OK**.
13. Resize the graph by dragging the corners or sides.
14. In the Data Set pane of the Layout page, open the **Student** data set, then click **Demographic** to reveal the list of demographic data objects.
15. Drag and drop the **Ethnicity** data object onto the graph layout.
16. Click **Preview** to see how many columns are in your graph.
17. Click **Edit** to return to the Layout page.
18. Click the **Inspector** icon.
19. On the Inspector, open the Graph Parts menu and select **Graph Area**.
20. Use the Graph Area Inspector to add extra Colors to match the number of columns in the graph; click an empty Color cell and select a color from the Color Panel; repeat as needed.
21. On the Graph layout, double-click the title, delete "Graph," and enter a new title, such as `Ethnicity Graph`.
22. Delete the subtitle and enter a new one, such as `Students by Ethnicity Code`.

23. Click **Preview** to view the completed graph; click **Edit** to return to the Layout page.



## Create a Student Schedule

To use a template to create a student schedule:

1. After launching ReportWorks, click **Project based on a template** on the Reportworks start page.
2. Select **Student Schedule List** from the template file menu.
3. Click **Create**.
4. On the Details page, enter a name such as `Student Schedule List xx`, adding initials.
5. Enter a description such as `Table of students with class enrollments from template`.
6. From the Data Set menu, select **Student: Basic + Schedule**.
7. Click the **Scope** tab.
8. Click **Runtime Controls**.
9. In the Published Report Runtime Controls section, click the **Selection of Class Enrollment Dates** and enter Start and End dates for the schedule search.
10. Click the **Layout** tab.
11. Click **Preview** to see how the template will display your requested information, then publish the report.

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## Use Templates

ReportWorks provides several project templates. When you create a project based on a template, ReportWorks configures the data set, applicable filters, and layout for you. Save the template as a project and then change any aspects of the template to fit the needs of your project.

## Bell Schedule Template

The Bell Schedule Template uses the "Student:Basic + Bell Schedule" data set to produce a student schedule matrix by periods and calendar days.

1. After launching ReportWorks, click **Project based on a template** on the ReportWorks start page.
2. Select **Student Bell Schedule** from the list of templates.
3. Click **Create**.
4. Edit the Project Name.
5. Click the **Scope** tab and modify the Boundaries and Runtime Controls, if needed.
6. Click the **Layout** tab and edit the layout, if needed.
7. Publish the report.

## Incident Detail Template

The Incident Detail Template is an Incident Management report that provides information about the incident and lists the participants involved in the incident. You can include behaviors, actions, objects, and attributes associated to each participant.

1. After launching ReportWorks, click **Project based on a template** on the ReportWorks start page.
2. Select **Incident Management: Participant Report** from the list of templates.
3. Click **Create**.
4. Edit the Project Name.
5. Click the **Scope** tab and modify the Boundaries and Runtime Controls, if needed.
6. Click the **Layout** tab and edit the layout, if needed.

7. Publish the report.

## School Summary of Incidents Template

The School Summary of Incidents Template is an Incident Management report that provides a count of incidents, by school and type.

1. After launching ReportWorks, click **Project based on a template** on the ReportWorks start page.
2. Select **Incident Management: CrossTab by School and Type** from the list of templates.
3. Click **Create**.
4. Edit the Project Name.
5. Click the **Scope** tab and modify the Boundaries and Runtime Controls, if needed.
6. Click the **Layout** tab and edit the layout, if needed.
7. Publish the report.

## District Summary of Incidents Template

The District Summary of Incidents Template is an Incident Management report that provides a summary of incidents, grouped by school. For each incident, this ReportWorks template provides the ID, incident date, recorded date, type, and title. The report also contains the the total number of incidents for the reporting period, and the total number of incidents per school.

1. After launching ReportWorks, click **Project based on a template** on the ReportWorks start page.
2. Select **Incident Management: District Summary** from the list of templates.
3. Click **Create**.
4. Edit the Project Name.
5. Click the **Scope** tab and modify the Boundaries and Runtime Controls, if needed.
6. Click the **Layout** tab and edit the layout, if needed.
7. Publish the report.

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## Form Letter Template

The Form Letter Template uses the "Student:Basic" data set to produce a form letter based on student data.

1. After launching ReportWorks, click **Project based on a template** on the ReportWorks start page.
2. Select **Student Form Letter** from the list of templates.
3. Click **Create**.
4. Edit the Project Name.
5. Click the **Scope** tab and modify the Boundaries and Runtime Controls, if needed.
6. Click the **Layout** tab.
7. Edit the content of the form letter and, if needed, the layout.
8. Publish the report.

## Use Publishing Options

To publish a project to a school or the District Office:

1. In the Projects column, right-click the project to be published and select **Load Project** from the menu.
2. When the project details appear, click the **Publish** tab.
3. In the Report Name field, enter a name for the published report.
4. In the Report Description field, enter a description.
5. From the Output Type menu, select **PDF**.
6. From the Application menu, select **PowerSchool Administrator Portal**.
7. From the Category menu, select the appropriate subject category for your report, such as **Enrollment**.
8. From the Unpublished Schools list, select the school you want to have access to the published report and click the right-pointing arrow to move the school name into the Published Schools list box. You can enter multiple schools.
9. To publish the report to the District Office, select **District Office** from the list of Unpublished Schools and click the right-pointing arrow to move the District Office to the list of Published Schools.
10. The Security Groups box is activated after selecting a school for publishing. In the same manner as the previous step, select

which security groups are to have access to the published report.

11. Click **Publish**.

To unpublish a report:

1. In the Projects column, right-click the project to be unpublished and select **Load Project** from the menu.
2. When the project details appear, click the **Publish** tab.
3. At the bottom of the page, click **Unpublish**.
4. The project remains on the server. Only you - the author - will be able to use it; other users no longer have access to the report.

Note: Updates to published reports do not occur automatically. You must unpublish and republish the report to update it with any changes made after publication.

## Reports without Data Objects

To create documents that contain only text and graphics, create a report that does not contain data objects or an associated data set. For example, a flyer advertising a school event may only include text and images.

1. After launching ReportWorks, click **Project from scratch** on the Reportworks start page.
2. Enter a Report Project Title.
3. Enter a Report Project Description.
4. Do not select a Data Set.
5. Click **Create**.
6. Click the **Layout** tab.
7. Use the Layout Tools to add lines, shapes, text, or hand-drawn graphics to the report.
8. To insert an image, drag and drop an image file from your desktop to the layout page. To reposition the image, click the image and drag.
9. Use the Inspector to format text, add color, or change the page layout.
10. Publish the report.