

Run a report from a saved template:

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The Create Report page allows you to create a customized report within an application for students at one campus or all campuses. The data is pulled from the most current student record for the selected school year. Only information linked to a student is retrieved.

The report heading includes the county-district number, campus ID(s), report title, school year, date and time, and page numbers.

The report can be sorted or filtered (see below).

Run a report from a saved template:

Report Template	Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list.
Report Template Directory	If you do not know the name of the report template, or if you are looking for a public report template, click Directory to select a report template from the directory. From the directory, you can select templates you created as well as public templates.

❑ Once the template is selected, press ENTER to populate the selections.

Create a new template:

Report Template	Type the name of a new report template. Only alphanumeric characters are allowed. **WARNING:** If you type a name that is already used, it will overwrite the previous template.
Public	Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.

❑ After entering the title and selecting the columns to include, click **Save**.

Create a new report:

Report Title	Type a title for the report, up to 35 characters.
Campus Options	Select **Campus** to print information for the campus to which you are logged on. Or, select **All Campuses** to print information for all campuses in the district to which you have access (according to your security settings).

- The fields are grouped by student table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g., **Demographic Information**).

- Click **Create Report** to generate the report. Review, save, and/or print the report.

Review the report using the following buttons:

Click First to go to the first page of the report.
Click ◀ to go back one page.
Click ▶ to go forward one page.
Click Last to go to the last page of the report.

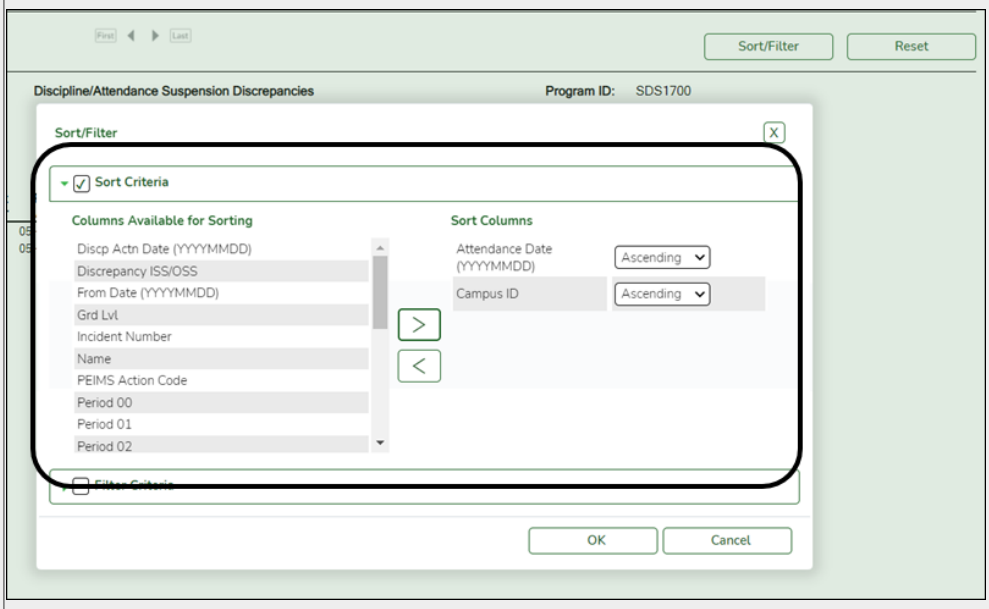
The report can be viewed and saved in various file formats.

Click to save and print the report in PDF format.
Click to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.
Click to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Sort

Sort report data.
You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.

In the report window, click **Sort/Filter** to open the Sort/Filter window. By default, the **Sort Criteria** section is expanded. If not, click **Sort Criteria**.



(Left grid) Columns Available for Sorting	Click the field by which you want to sort, and then click >. The field moves to the right grid. Continue moving fields to the right grid as needed.
(Right grid) Sort Columns	You can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location. • In the right grid, for each field, indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order. • To remove a field from the sort, select the field, and then click < to move it back to the left grid.

Select the **Sort Criteria** check box and click **OK** to apply the selected sort criteria to the report.

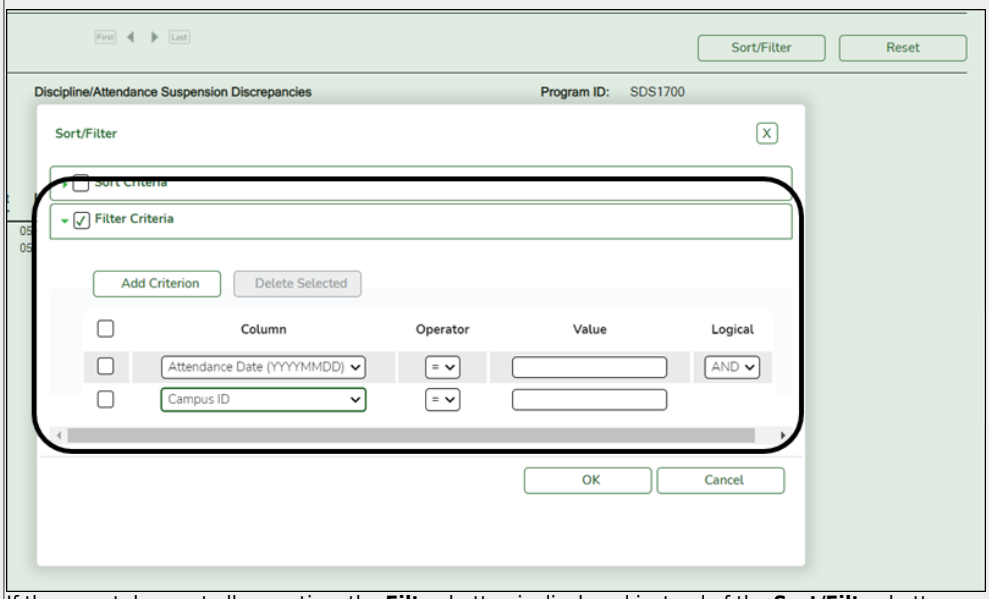
Click **Cancel** to close the window without re-sorting.

Filter Filter report data.

Filter

When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.

From the report window, click **Sort/Filter** to open the Sort/Filter window. By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section.



If the report does not allow sorting, the **Filter** button is displayed instead of the **Sort/Filter** button, and sort criterion fields are not available.

Click **Add Criterion** to add new filter criteria. A blank row is added to the grid.

Column	Select a field by which to filter the data. The drop down lists the columns that appear on the report.
Operator	Select an operator. = Equals ≠ Not equals › Greater than ≥ Greater than or equal to ‹ Less than ≤ Less than or equal to
Value	Type the value by which you want to filter. For example, if you selected a date in the **Column** field, type a date to view only data for a specific date. **Note:** When filtering report data by date, you must use the following formats: • If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. • If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. • If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.

Add Criterion	Add another row. Select the logical connector (*AND* or *OR*) in the **Logical** field. Continue adding rows as needed. The **Logical** field does not appear until you click **Add Criterion** to add an additional row. • Using the AND operator limits search results, because the program looks only for records that contain both criterion. • Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.
Delete Selected	Delete selected row. Select the row, and then click the button. The row is deleted from the filter criteria.

Click **OK** to apply the selected filter criteria to the report.

Click **Cancel** to close the dialog box without applying a filter.

NOTE: Some applications allow you to filter by specific data:

In Test Scores, you can filter report data to include only students who are enrolled in special programs. When filtering report data for At Risk, PRS, and GT programs, you must select 1 (Yes) or 0 (No) in the **Value** field. For example, if you filter report data for the At Risk program by selecting *Equals* in the **Operator** field and *Yes* in the **Value** field, no data is displayed; however, if you select *1* in the **Value** field, the At Risk data is displayed.

Reset	Reset report data. Click to restore the report to the original view, removing all sorting and filtering that has been applied.
Delete	Delete a report template. Select the template in the **Report Template** field and click **Delete**.


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