ProgressBook Reporting Report Designer Guide

Reporting

ProgressBook Reporting Report Designer Guide

(This document is current for v20.1.0 or later.)

Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook Reporting Report Designer Guide* have been made.

| Product Version	Heading	Page	Reason
20.1.0	*"Scheduling Reports"*	14	Updated text to reflect new security updates.
20.1.0	*"Security"*	34	Updated screenshots and text to reflect new security updates.
19.5.0	*"Scheduling a Report"*	14	Added note regarding failed scheduled report jobs.
19.5.0	*"Preset Account Roles"*	34	Updated table to reflect new **District Shared** folder.
19.5.0	*"Resource Permission Features"*	39	Added note regarding **District Shared** folder.
19.4.0	Entire Guide	N/A	Created guide.

Table of Contents

Report Designer

The **Report Designer** lets you modify officially provided reports, create your own reports, schedule reports, and share reports. Vendors can also receive report data through the FTP feature. For more information, refer to the sections and links below:

- *"Report Designer Dashboard"*
- *"Editing Reports"*
- *"Scheduling Reports"*
- *"Running Reports"*
- *"Sharing Reports"*
- *"FTP Reports"*
- *"Creating Express View Reports"*
- *"Creating Advanced Reports"*

To access **Report Designer**, you must have the appropriate security settings (see *"Security"*).

Report Designer Dashboard

Below is a quick reference depicting the main dashboard of the Report Designer. Where applicable, more details are provided in the relevant sections of this guide.
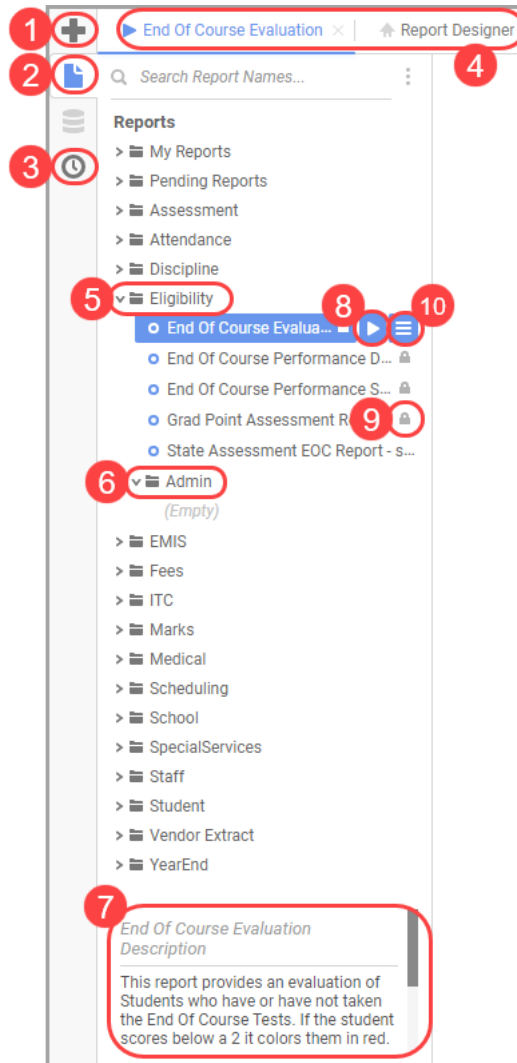
1. Click to create a new report (see *"Creating Express View Reports"* and *"Creating Advanced Reports"*).

2. Click to browse reports.

3. Click to schedule reports (see *"Scheduling Reports"*).

4. Tabs for the **Report Designer** and any open reports display. Click any tab to switch to it.

5. Report category folder

6. Report category subfolder

7. Description for the selected report

8. Click to run the selected report (see *"Running Reports"*).

9. Indicates that the report is an officially provided report and cannot be modified directly.

10. Click to view more options for the selected report.

- **Edit** (see *"Editing Reports"*) – Available only if it is a modifiable report (no 🔒) based on your security level.

- **Run Report** (see *"Running Reports"*)

- **Export As** – Select the file type to which you want to export the report, and then run the report (see *"Running Reports"*). It downloads automatically in the selected format.

- **Schedule Report** (see *"Scheduling Reports"*)

- **Email Report** – Enter an email address and select the file type to which you want to export the report, and then run the report (see *"Running Reports"*). It is automatically sent to the specified email address in the selected format.

- **Rename** – Available only if it is a modifiable report (no 🔒) based on your security level.

- **Duplicate** (see *"Duplicating Reports"*) – Officially provided reports can be duplicated if you wish to modify them.

- **Delete** – Available only if it is a modifiable report (no 🔒) based on your security level.

- **Download** (see *"Sharing Reports"*) – Available only if it is a modifiable report (no 🔒) based on your security level.

Editing Reports

Editing reports lets you enhance an officially provided report to fit your needs. If a report already provides most of the fields you want, you can edit it to include additional data or remove information you do not need.

Each report typically has only 1 category associated with it that contains all the fields you can add to a report. If you want to add fields to a report, verify that the category used contains the field you need (see the *Reporting Category Information Guide*).

The following examples uses the **Grad Point Assessment Remediation** report.

> ***Note:*** *Reports that were created through duplicating and modifying are not linked to the original officially provided report. If a change is made to the officially provided report, the change is not reflected in the modified report. You can see the date on which a report was last updated in the* Reporting Report List.

Duplicating Reports

Officially provided reports cannot be edited directly. If you wish to modify an officially provided report, you must first duplicate it before you can edit and save it as its own report.

1. On the **Report Designer** dashboard, locate the report you wish to edit.
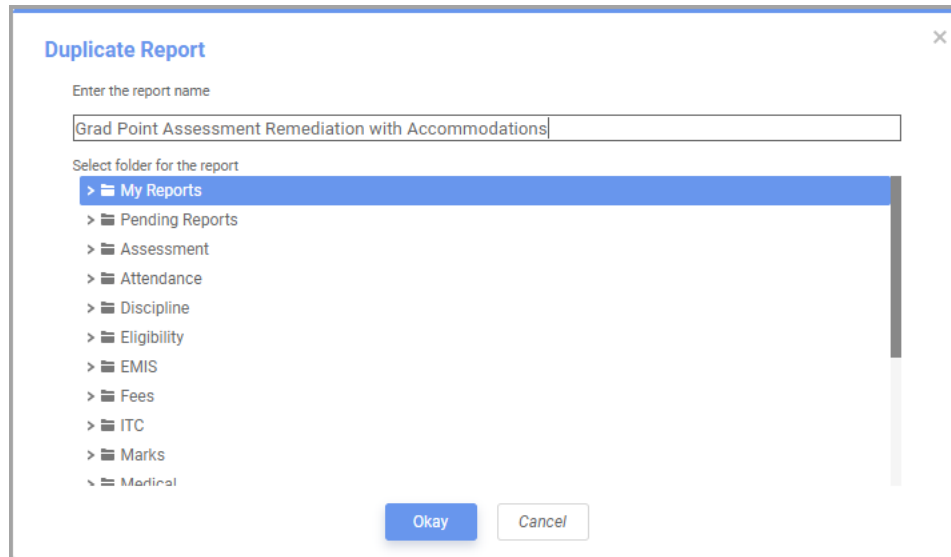
2. Click , and then click **Duplicate**.
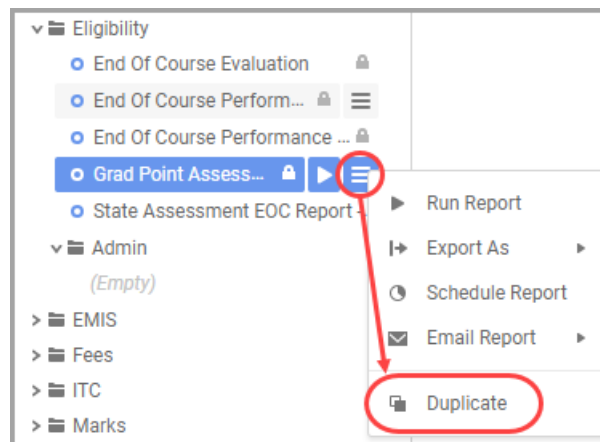
A window opens, prompting you to select a folder in which to save the duplicated report.

3. Updated the duplicate report name as desired.

4. Select **My Reports**, then click **Okay**.

   Note: *Reports saved in any other folder (e.g., **EMIS**) become immediately available to users who have access to that particular folder. It is recommended that while you are editing a report, you should save it to **My Reports** until you are sure that you want to give other users the ability to run the edited report (see "Sharing Reports").*

5. Go to **My Reports**, select the duplicated report, click ☰ , and then click **Edit**.
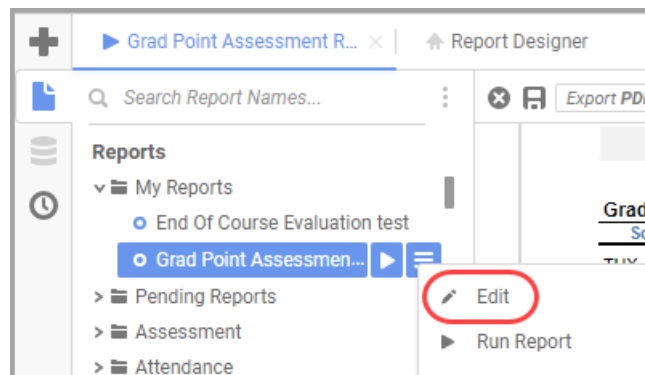
6. In the editor dashboard that displays, you can perform any of the following actions:

   • *"Adding Fields"*
   • *"Removing Fields"*
   • *"Changing Sort Order"*
   • *"Changing Filters"*

7. Click 🖫 after making any changes to ensure that they are saved.

Adding Fields

In the example below, the **Accommodations** field is added to the **Grad Point Assessment Remediation** report after the **Testing Date** column.

1. To add a field to a report, click a section header, then select **Insert Columns After**.
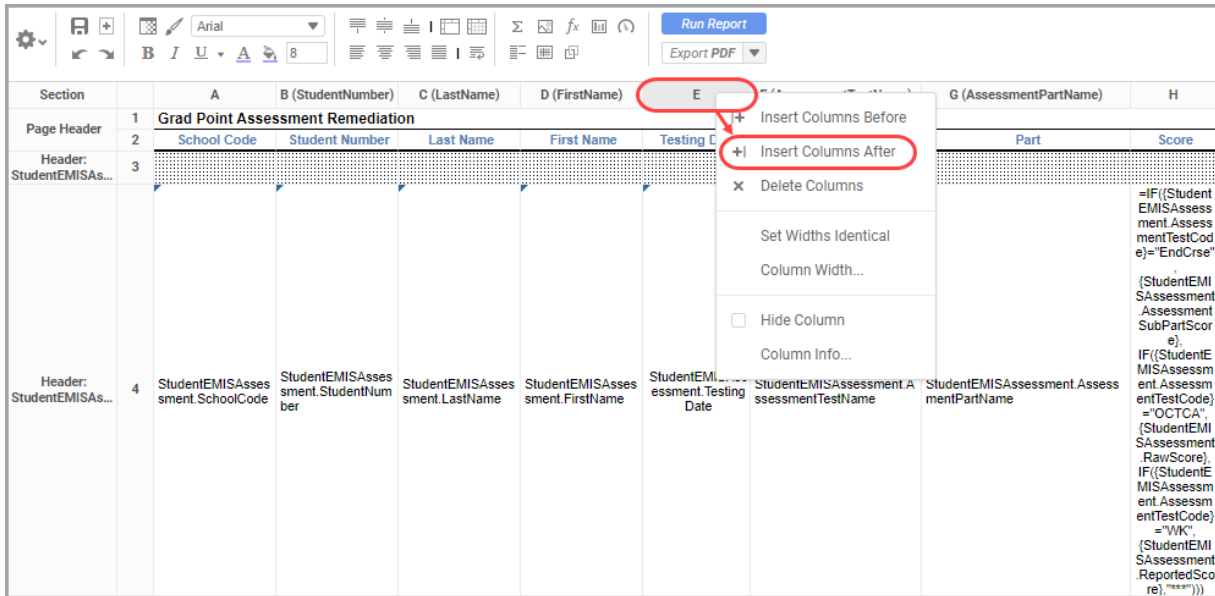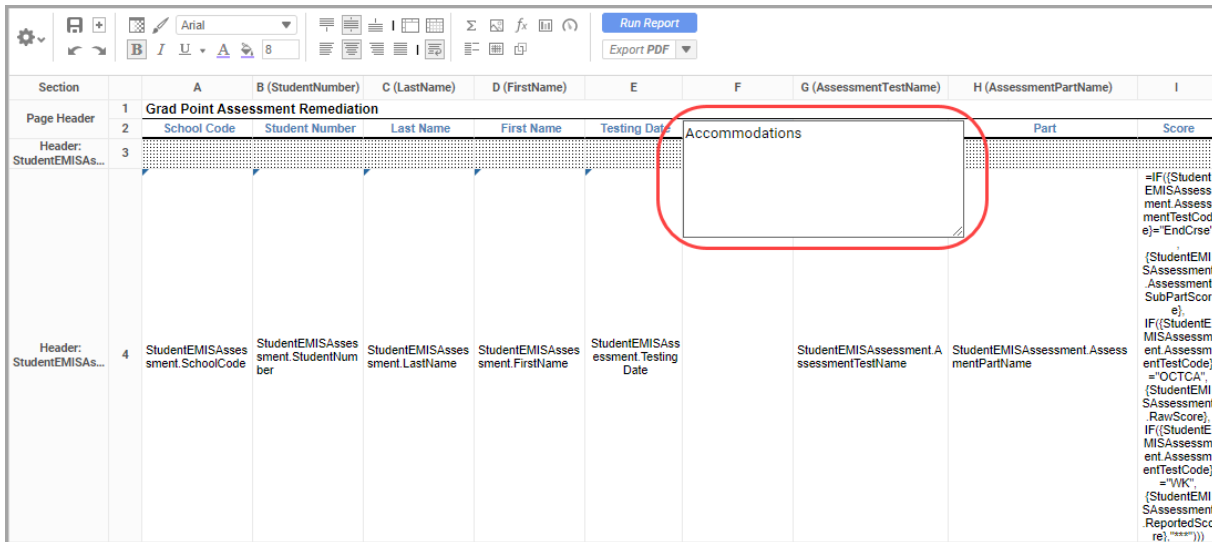

A blank column displays.

2. In the **Page Header** row, copy the cell format from another column in the report using CTRL + C, or right-click and select **Copy**, then paste the formatting into the blank cell using CTRL + V, or right-click and select **Paste**.
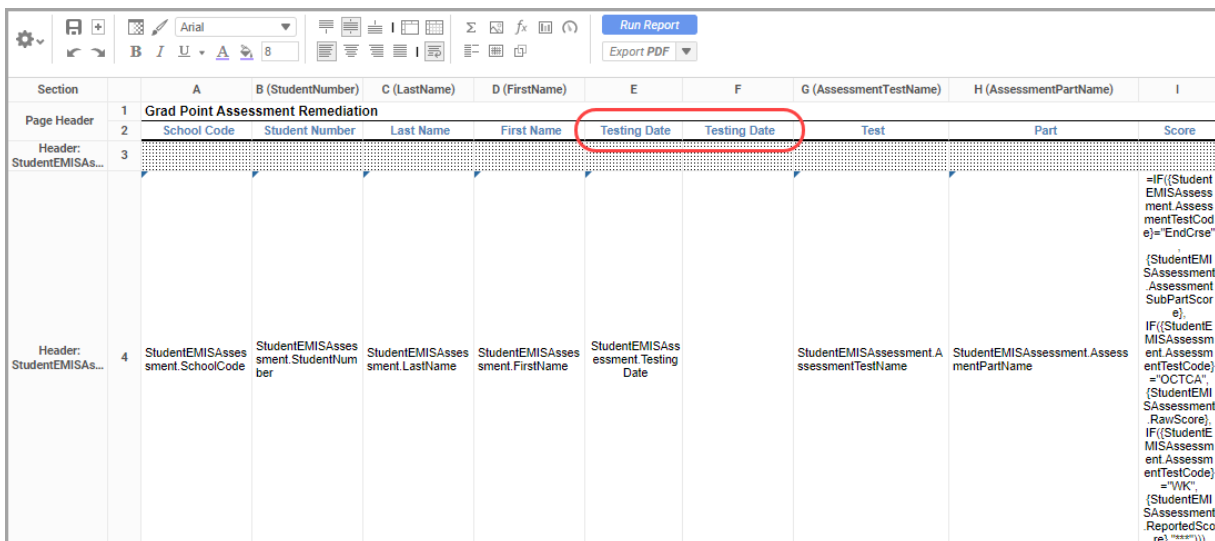
3. Double-click the **Page Header** cell in the new column, then update the name as necessary.

4. Select the cell in which you want to add field data. On the left side below **Fields**, locate the field you wish to add, and then click ➡️, or double-click to add the field to the empty cell. The new field displays in the cell.
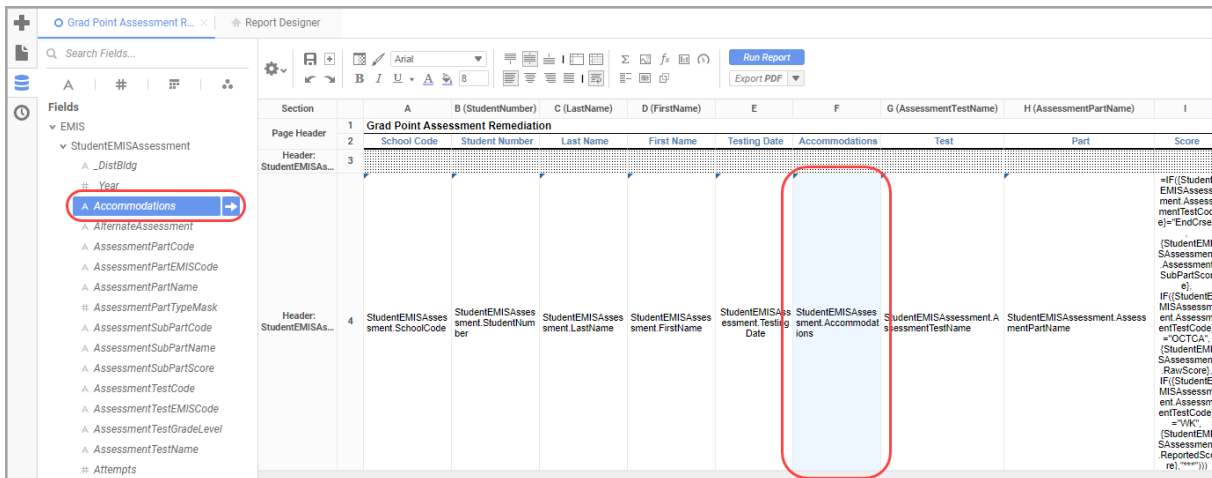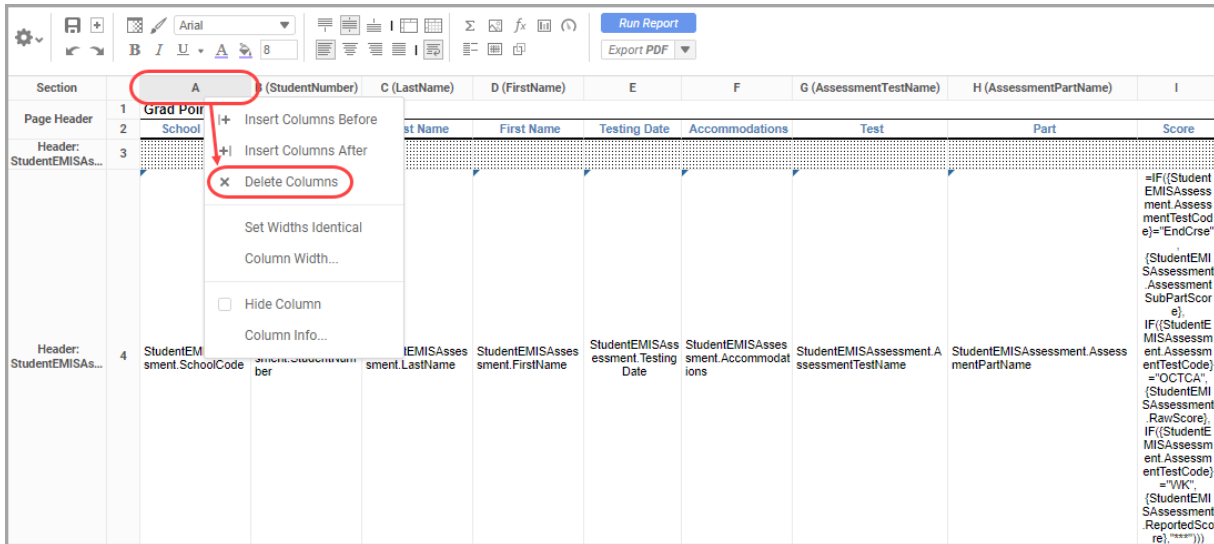

5. Click 💾 to save your changes.
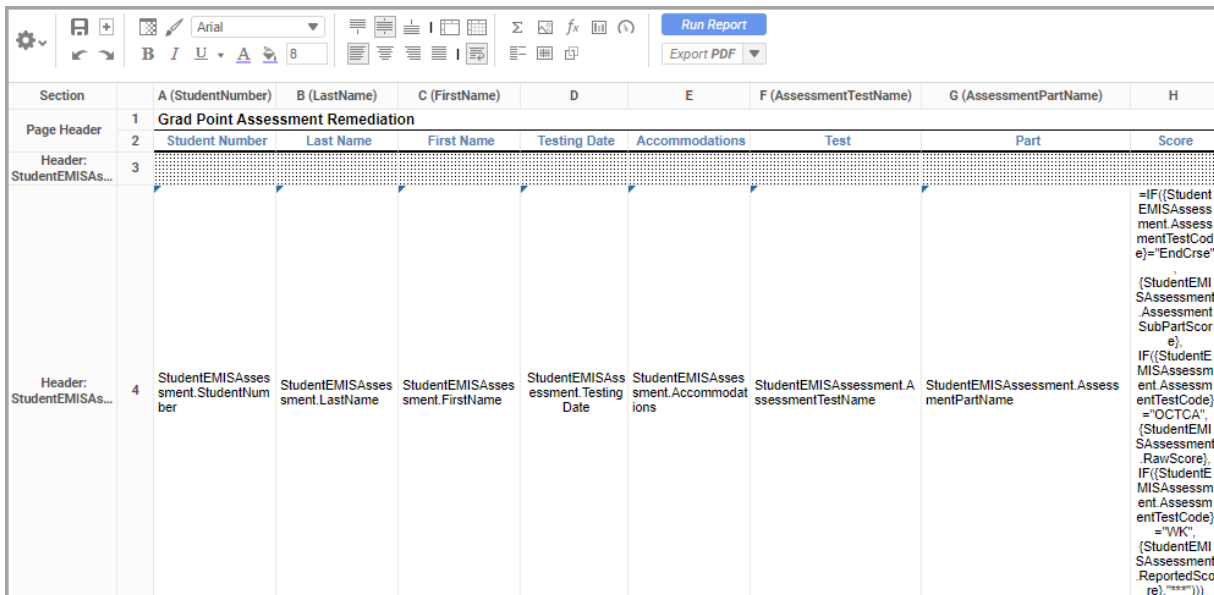6. (Optional) Repeat *step 1* through *step 5* as needed.

Removing Fields

In the example below, the **School Code** field is removed from the **Grad Point Assessment Remediation** report.

1. Select the **Section** header for the column you wish to remove, then click **Delete Columns**.


The column no longer displays.

2. Click 🖫 to save your changes.

3. (Optional) Repeat *step 1* and *step 2* as needed.

Changing Sort Order

You can change the way data is organized in the report by updating the sort order. For instance, the **Grad Point Assessment Remediation** report sorts in ascending order by the student's last name, first name, student ID, assessment test code, assessment part name, and assessment subpart name. Since the data is sorted by student name first, the report displays the student's name and then all relevant assessments the student has taken. If the data is sorted by

assessment test code first, then the report displays an assessment name and then all students who have taken that assessment. Thus, the sort order heavily affects the communication of the data collected.
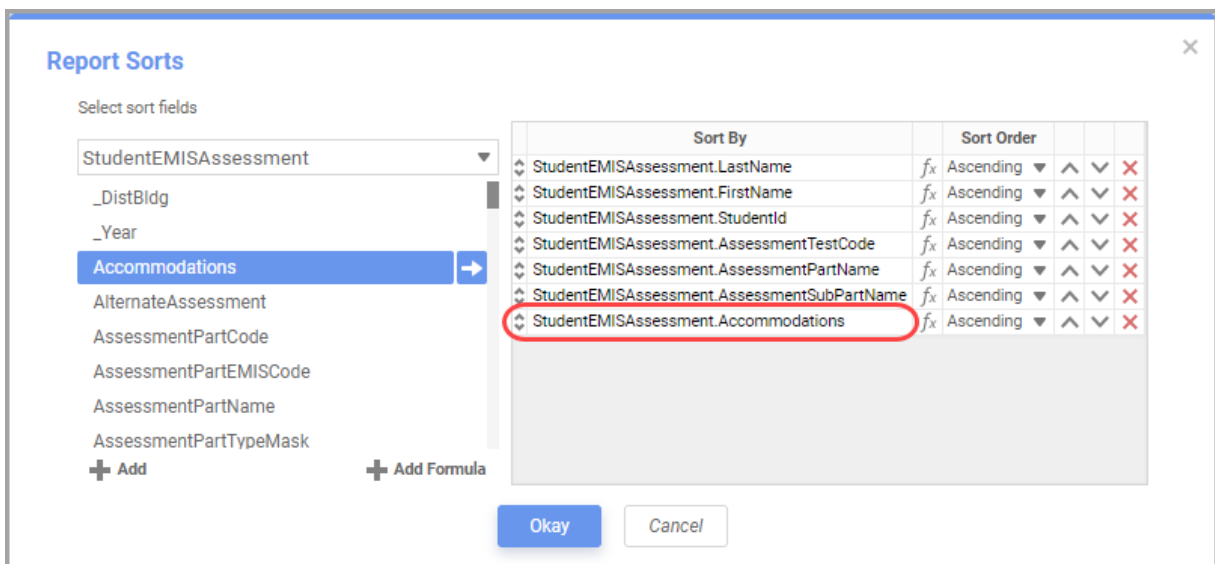
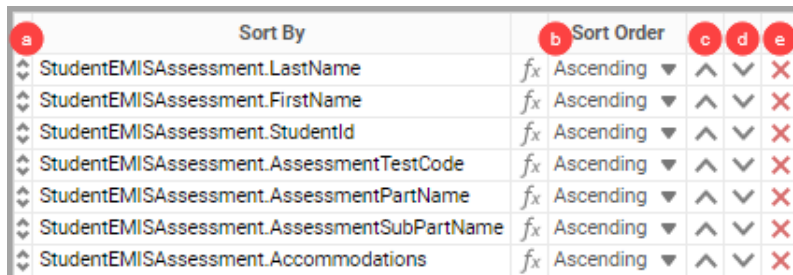1. Click ![gear icon], then select **Sorts**.
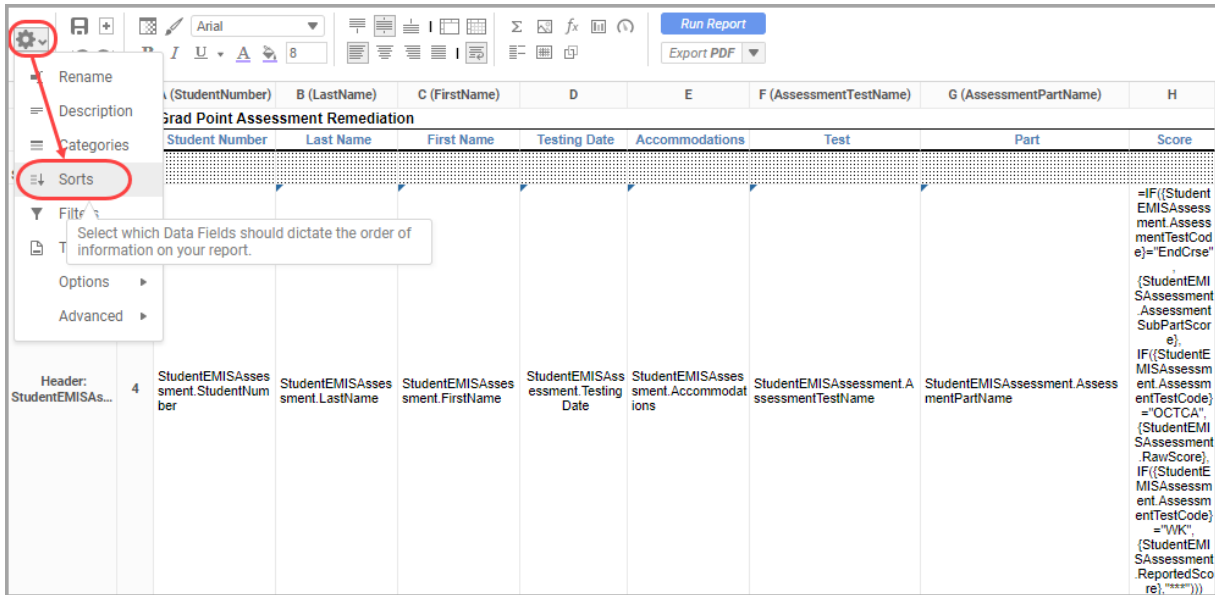
The **Report Sorts** window opens, displaying the sort order across various fields for the report.

2. To add a sort field, on the left, select the field by which the report should sort, then click ![arrow icon] or **Add**.

The field displays in the grid on the right.

3. (Optional) You can delete or change the sort order of existing fields using the following options:

    a. Click ⬍ and drag to move a field up or down multiple rows to determine the field order by which the report sorts.

    b. Click ▼ to select whether a field should sort in **Ascending** or **Descending** order.

    c. Click ⌃ to move a field up 1 row in the sort order.

    d. Click ⌄ to move a field down 1 row in the sort order.

    e. Click ✖ to remove a field from the sort order.

a	Sort By	b	Sort Order	c	d	e
⬍	StudentEMISAssessment.LastName	ƒx	Ascending ▼	⌃	⌄	✖
⬍	StudentEMISAssessment.FirstName	ƒx	Ascending ▼	⌃	⌄	✖
⬍	StudentEMISAssessment.StudentId	ƒx	Ascending ▼	⌃	⌄	✖
⬍	StudentEMISAssessment.AssessmentTestCode	ƒx	Ascending ▼	⌃	⌄	✖
⬍	StudentEMISAssessment.AssessmentPartName	ƒx	Ascending ▼	⌃	⌄	✖
⬍	StudentEMISAssessment.AssessmentSubPartName	ƒx	Ascending ▼	⌃	⌄	✖
⬍	StudentEMISAssessment.Accommodations	ƒx	Ascending ▼	⌃	⌄	✖

4. When you are done making changes, click **Okay**.

5. Click 🖫 to save your changes.

Changing Filters

Changing filters lets you adjust the data filters a user can select before the report is run. If too many filters are selected, a report can result in no data returned.

> *Note: When running the report, all values must be selected in a top-down sequential order. Each value a user selects for a filter affects the value(s) available for the next filter.*

1. Click , then select **Filters**.
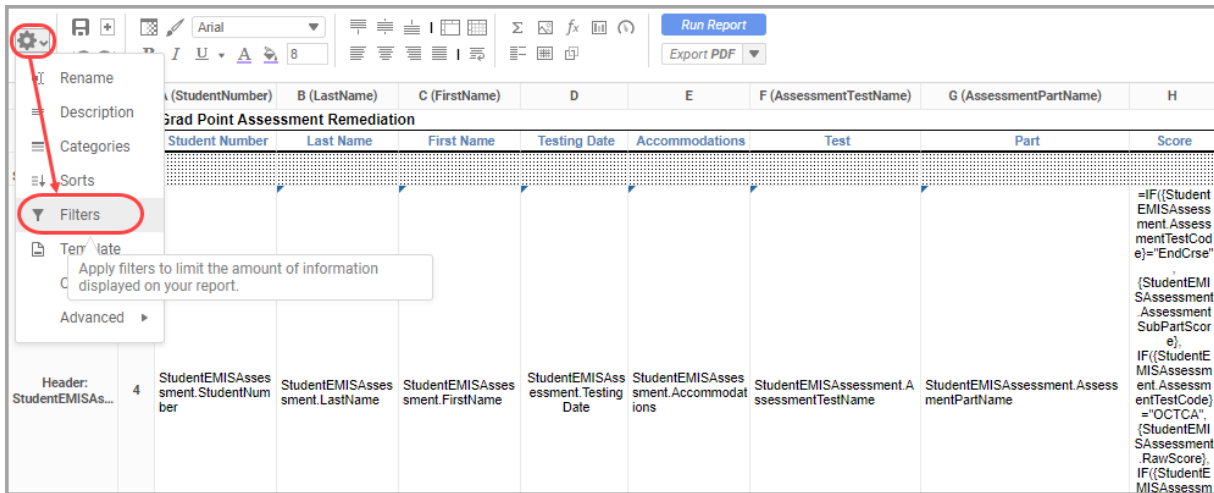
The **Report Filters** window opens.

2. To add a filter, on the left, locate the filter you wish to add, then click or **Add**.

The new filter displays at the bottom of the grid.
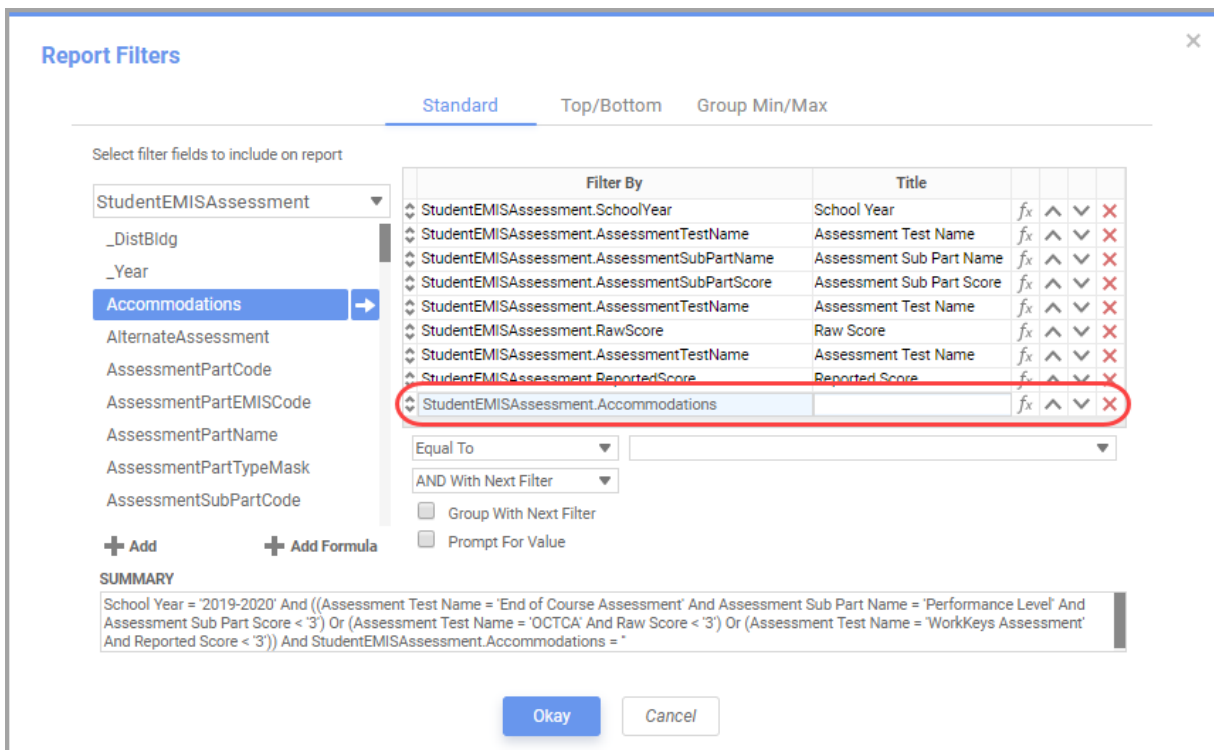
3. To delete a filter, in its corresponding row, click ✖.
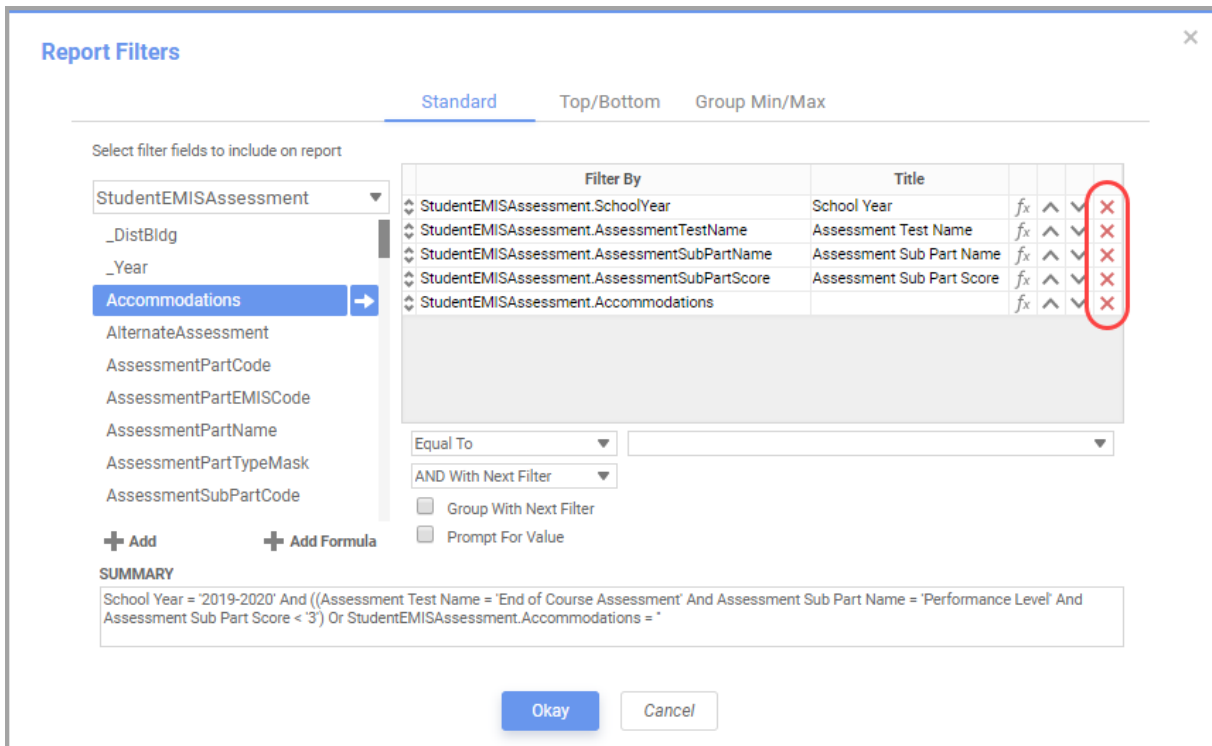
4. You can further modify your selected filters with the following options:

   a. Enter a user-friendly title for the filter. This is the text that displays when a user runs the report and must select a filter.

   b. Click ⌃ or ⌄ to move the order of the filters.

   Note: When running the report, all values must be selected in a top-down sequential order. Each value a user selects for a filter affects the value(s) available for the next filter.

   c. Select the default **Conditions** that display for the filter (see *"Running Reports"* for a breakdown of the available conditions).

   d. Select the default value that displays for the filter.

   e. Select whether the filter relationship is AND or OR with the next filter.

   f. Select this checkbox to indicate that the filter should be grouped with the next filter.

g. Select this checkbox to let the user modify the filter value when they run the report.

5. The **SUMMARY** displays the logic applied to all filters. You can use it verify that the filters are set up correctly. When you are satisfied with the changes, click **Okay**.

6. Click 🖫 to save your changes.

Scheduling Reports

All available reports, including custom reports, can be scheduled to run and either emailed or sent via FTP to users/vendors (see *"FTP Reports"*). User accounts must have the appropriate security roles to schedule reports (see *"Security"*).

> **Note:** *Scheduled jobs are account specific; multiple accounts can schedule jobs for the same report with different schedule settings and recipients.*

Once you have scheduled reports, you can review the scheduled jobs you have set up as well as edit and delete the scheduled jobs (see *"Managing Scheduled Reports"*).

> **Note:** *Managing scheduled reports is account specific; you can manage only scheduled jobs that you have created, not jobs that other accounts have created.*

Scheduling a Report

1. On the **Report Designer** dashboard, locate the report you wish to schedule.

2. Click ☰ , and then click **Schedule Report**.
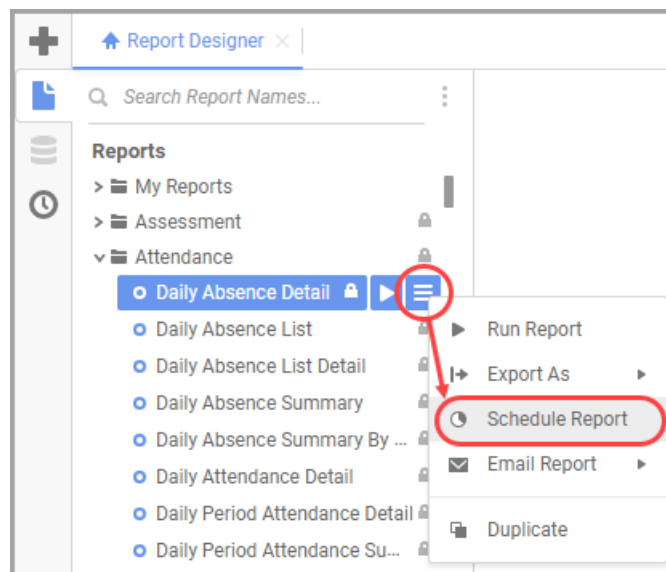
The **Schedule Report** tab displays.

3. On the **Recurrence** subtab, enter or select the appropriate values.

   a. **Schedule Name** – Enter the name of the job so that it can be easily identified for future reference.

   b. **Export Type** – Select one of the following export formats for the report: **Excel**, **PDF**, **RTF**, or **CSV**.

   c. **Password (optional)** and **Confirm Password** (conditional) – When you select an **Export Type** of **Excel** or **PDF**, you can enter a password to secure the report. When you enter a password, the report file that is sent can be opened only with the password. You must communicate the password to your recipient so that they can open the file.

   Note: If you forget the password, you must edit the job, change the password, then rerun the scheduled job (see "Managing Scheduled Reports").

   d. **Execute Immediately** – Select this checkbox to execute the report immediately; this deactivates all other scheduling options.

   e. **Schedule Time** – Select or enter the time you would like the report to run. Click 🕐 to select a time from a drop-down list of half-hour increments.

   • **Repeat Every...** – Select this checkbox to run the report repeatedly every **[x] hour(s) [x] minute(s) until [time]** on the scheduled date.

   f. **Recurrence Pattern** – Select the frequency with which the report should run (**Once**, **Daily**, **Weekly**, **Monthly**, or **Yearly**). Depending on your selection, different options display.

- **Once** – Select or enter the **Schedule On** date to indicate the date on which the report should run.

- **Daily** – Select either **Every [x] day(s)** or **Every weekday**.

- **Weekly** – Select whether the report will **Recur every [x] week(s) on** the selected days of the week.

- **Monthly** – Select whether the report will run on **Day [x] of every [x] month(s)** or on **The [1st/2nd/3rd/4th/last] [type of day] of every [x] month(s)**.

- **Yearly** – Select whether the report will run **Every [month] [date]** or **The [1st/2nd/3rd/4th/last] [type of day] of [month]**.

g. **Range of Recurrence** (conditional) – When you select a recurrence pattern other than **Once**, you can then select the duration in which the recurrence should occur. Select or enter a **Start** date, then select one of the following recurrence options: **No end date**, **End after [x] occurrences**, or **End by [date]**.

4. Click **Next** to proceed to the **Filters** subtab.
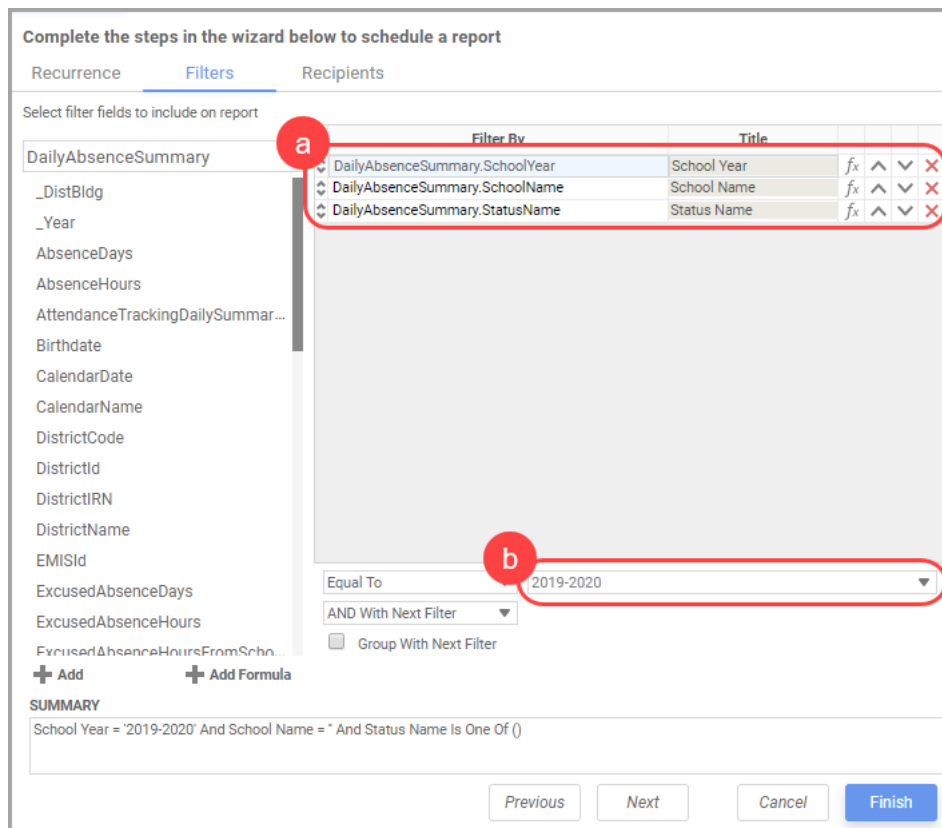
5. On the **Filters** subtab, you can select the filter values that you wish to apply to the report.

a. Select the corresponding row of the filter whose value you wish to select.

b. Below the filter grid, in the top-right drop-down list, select the filter value to apply.

c. (Optional) Repeat *step a* and *step b* as needed.

   Note: Each value you select for a filter affects the value(s) available for the next filter value; thus, it is recommended that you select the value(s) in top-down sequential order. If you leave the value blank, the report assumes that all available values were selected.

   Note: Selecting too many filters may return no results.

d. When you are done selecting values, you can review the **SUMMARY** to verify that the correct values have been selected for each filter.

6. Click **Next** to proceed to the **Recipients** subtab.

   a. Select the **Email Results** checkbox to email the report results to other users.

      *Note: Deselect the **Email Results** checkbox to send the report results via FTP (see "FTP Reports").*

   b. Enter email addresses in the **To**, **Cc**, and **Bcc** fields as needed.

   c. (Optional) Update the **Subject** of the email.

   d. In the text field, enter any information you wish to include in the email along with the report results.

Complete the steps in the wizard below to schedule a report

| Recurrence | Filters | Recipients |

☑ Email Results

To: aaa@abcdschool.com

Cc:

Bcc:

Subject: Scheduled Ad Hoc Report

Previous   Next   Cancel   Finish

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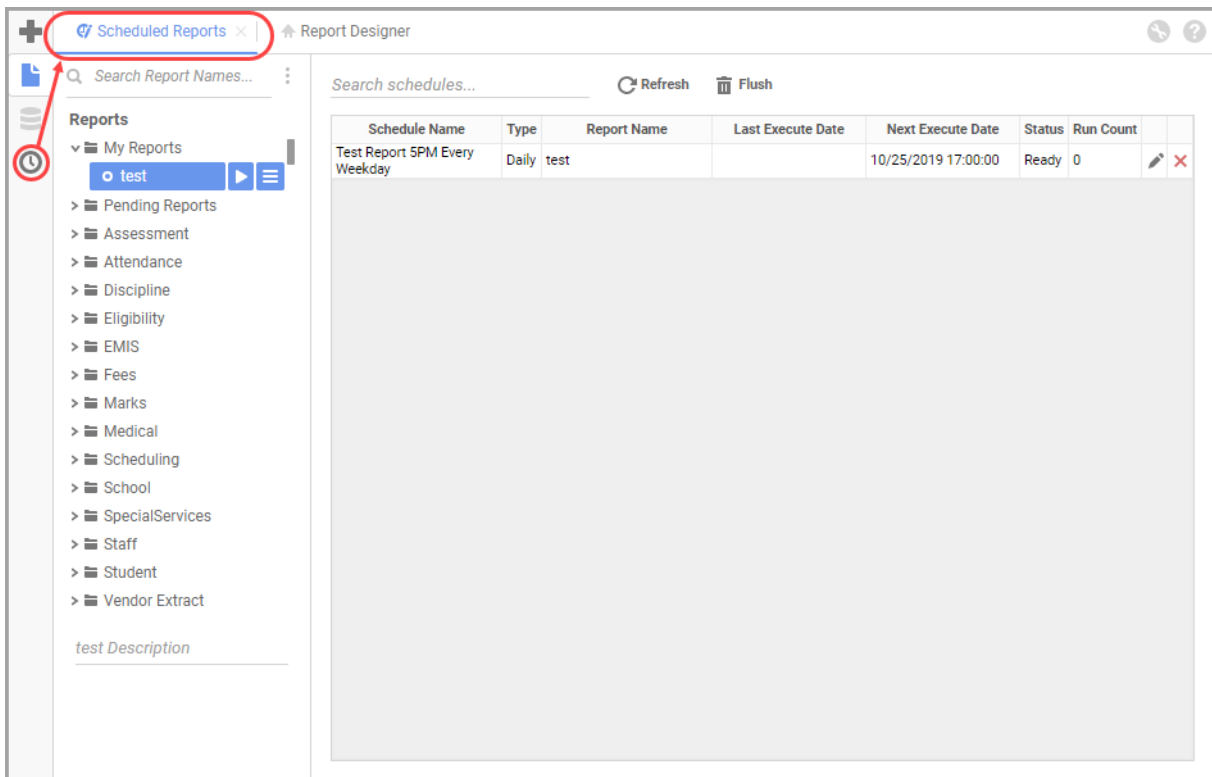
7. Click **Finish** to save the scheduled job. The report now runs at the scheduled intervals and the results are sent to the specified recipients.

   *Note: The **Batch Management** window displays any scheduled report job that failed and a message description for why it failed.*

Managing Scheduled Reports

Once a schedule job has been set up, you can review all jobs you have created as well as edit and delete them if needed.

1. On the **Report Designer** screen, click 🕐 to view the **Scheduled Reports** tab.

   The **Scheduled Reports** tab displays.

2. The **Status** column indicates the scheduled job's condition.

   a. **Ready** – The job will run on its **Next Execute Date**.

   b. **Running** – The job is currently running.

   c. **Transmitting** – The job has been run and the results are being sent to the specified user(s).

   d. **Completed** – The job has run its final event and will not run again (e.g., if an end date has been configured). It will be removed from the list when the cache is flushed.

   e. **Deleted** – The job has been deleted and will be removed from the list when the cache is flushed.

   f. **Abended** – The last run failed due to an error and the job will not run again.

   g. **User Aborted** – The job was running but was then requested to be canceled. It will then be marked as **Deleted**.

3. (Optional) Click **Refresh** to update the status of the jobs.

4. (Optional) Click **Flush** to remove **Completed** and **Deleted** jobs from the list.

    Note: *The system autoflushes continuously and you may not need to manually flush any items.*

5. (Optional) Click ✐ to edit a scheduled job. All updates made affect only all future run times.

6. (Optional) Click ✖ to change a job **Status** to **Deleted**. If the job **Status** is already **Deleted**, click ✖ to remove the job from the list or click **Flush**.

Running Reports

1. In **Report Designer**, locate the report you wish to run in its corresponding folder or subfolder, then either double-click the report or click ▶.

   For most reports, a **Filters** window opens. Otherwise, the report runs immediately.

2. (Optional) Select different **Conditions** for each filter to ensure that the data you need is returned. In most cases, it is not necessary to modify the preselected condition. Below is a list of all available conditions:

   - **Equal To** – Includes results that match the selected value.
   - **Not Equal To** – Excludes results that match the selected value.
   - **Less Than** – Includes results that are less than the selected value.
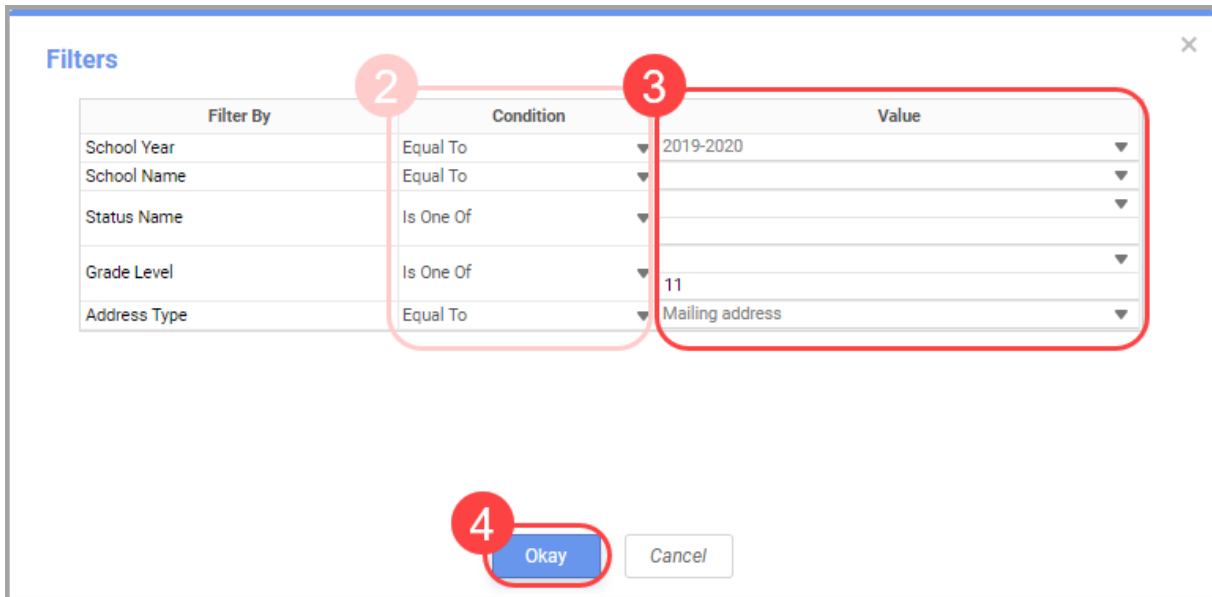   - **Less Than Or Equal To** – Includes results that are less than or equal to the selected value.
   - **Greater Than** – Includes results that are greater than the selected value.
   - **Greater Than Or Equal To** – Includes results that are greater than or equal to the selected value.
   - **Starts With** – Includes results that start with the selected value.
   - **Not Starts With** – Excludes results that start with the selected value.
   - **Ends With** – Includes results that end with the selected value.
   - **Does Not End With** – Excludes results that end with the selected value.
   - **Contains** – Includes results that contain the selected value.
   - **Does Not Contain** – Excludes results that contain the selected value.
   - **Is Between** – Includes results that are between 2 selected values, such as a date range.

- **Is Not Between** – Includes results that are not between 2 selected values, such as a date range.
- **Is One Of** – Includes results that have one or more selected values.
- **Is Not One Of** – Includes results that are not one or more selected values.

3. Select the value(s) for each filter. Values are available only if there is data to return. If you do not see any values, try changing a prior value.

   Note: Each value you select for a filter affects the value(s) available for the next filter value; thus, it is recommended that you select the value(s) in top-down sequential order.

   Note: Selecting too many filters may return no results.

4. Click **Okay** to run the report.

   The report displays.

5. (Optional) Click the post-filter pane icon to further narrow down the result set.

   The post-filter pane displays with a list of **Sorts** and **Columns**.

   a. (Optional) In the **Sorts** section, click ⬇ or ⬆ to change the sort order for fields that can be sorted.

   b. (Optional) In the **Columns** section, deselect the corresponding checkbox for each column header to hide that column in the report.

c.   (Optional) Click the post-filter pane icon to collapse the pane.

6.   (Optional) In the **Export** drop-down list, select one of the following export formats for the report: **Excel**, **PDF**, **RTF**, or **CSV**.
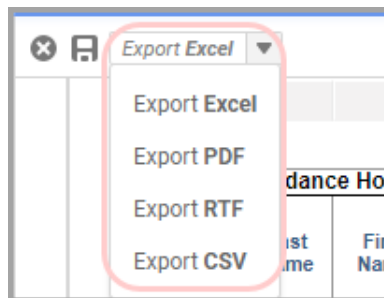
The exported file is automatically downloaded to your computer.

Sharing Reports

You can share reports by downloading an unlocked WR file, i.e., edited/duplicated versions of officially provided reports or user-created reports (see *"Editing Reports"*). Once the file has been downloaded, you can share the WR file with another district or ITC and they can upload it to their preferred folder.

Downloading a Report

1. On the **Report Designer** screen, locate the report (without 🔒) that you want to download and share.

2. Click ☰ , and then click **Download**.
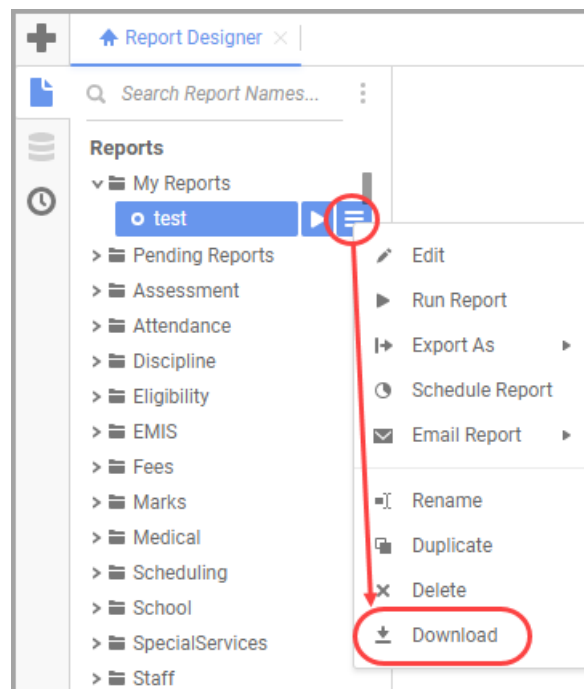
3. Depending on your browser's settings, the file may automatically download, or you may receive a prompt to download the WR file.

Uploading a Report

1. On the **Report Designer** screen, locate the folder (without 🔒) to which you want to upload the report.

   Note: Uploaded reports display only for the district you had in context when you uploaded the report. To upload a report to multiple districts, you must repeat the process for each district.

1. Click [≡], and then click **Upload**.
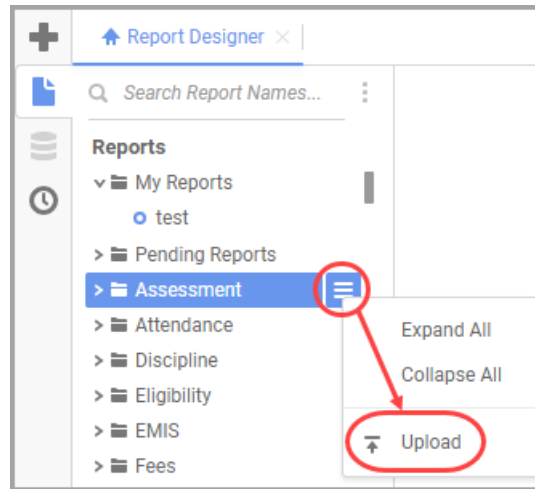
2. In the window that opens, locate the report WR file that you wish to upload, then click **Open**.
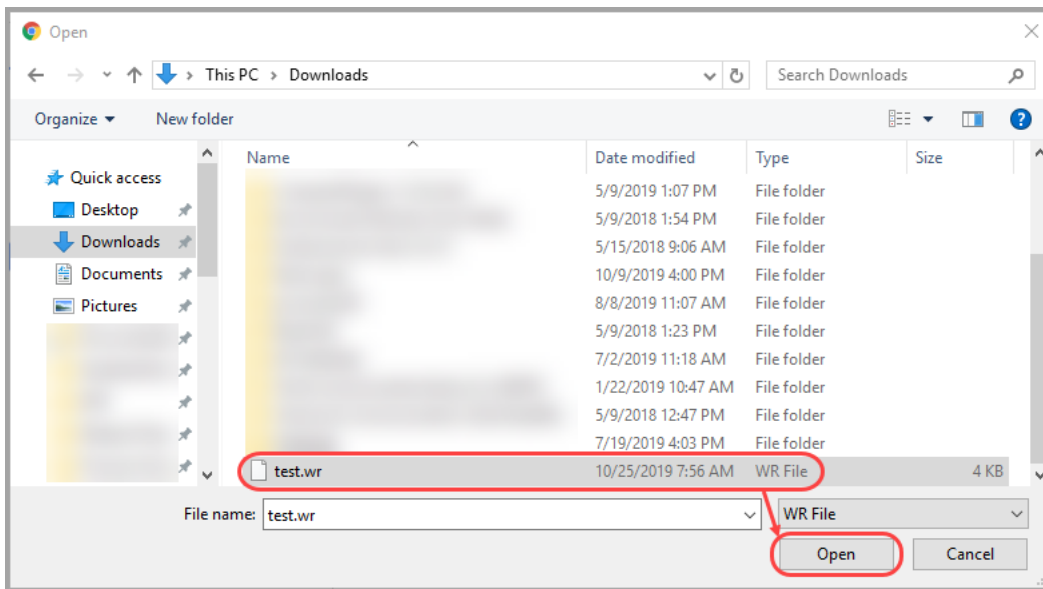
The uploaded report now displays in its corresponding folder for the district on both the **Report Designer** and **Analytics Hub** screens.
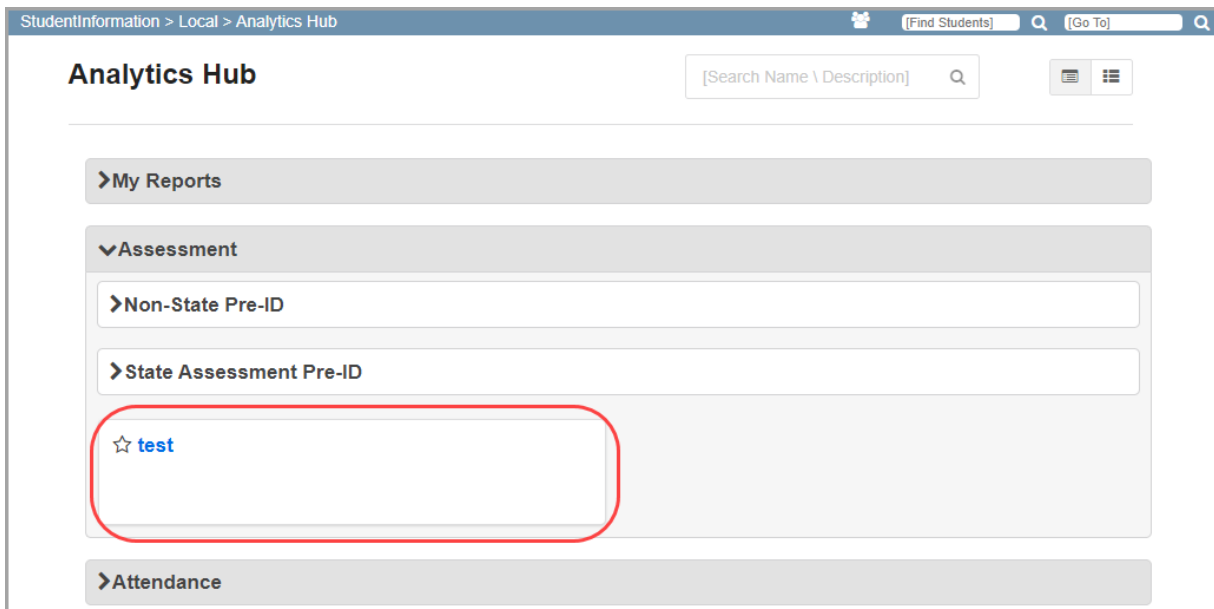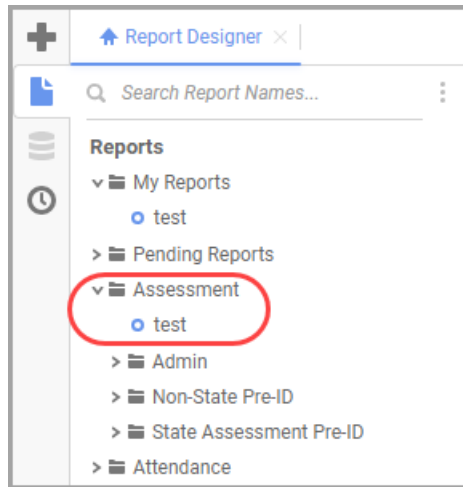
FTP Reports

Before reports can be sent via FTP to a vendor, the report and FTP server must be set up within StudentInformation. Once both are in place, the report is sent via FTP to a vendor based on the configured schedule job (see *"Scheduling Reports"*).

- *"Setting Up Reports"*
- *"Setting Up FTP Server"*

Setting Up Reports

1. Locate the report you wish to send via FTP, click ☰ , and then click **Edit**.

    Note: *This must be a report to which you have edit access (see "Editing Reports").*
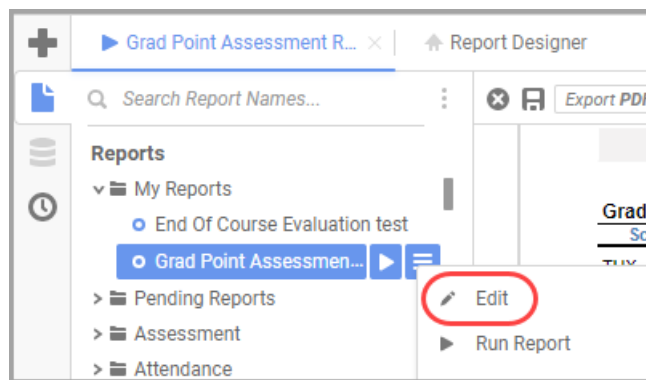
2. In the editor dashboard that displays, click ⚙, **Options**, and then **Custom**.
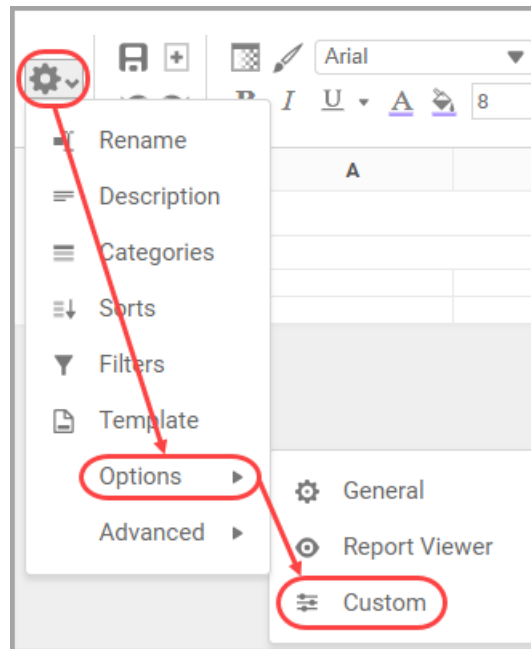
The **Custom Options** window opens.

3. Select the **Is_Vendor_Extract** checkbox, then click **Okay**.

*Note: Some reports have the **Is_Vendor_Extract** checkbox selected by default.*
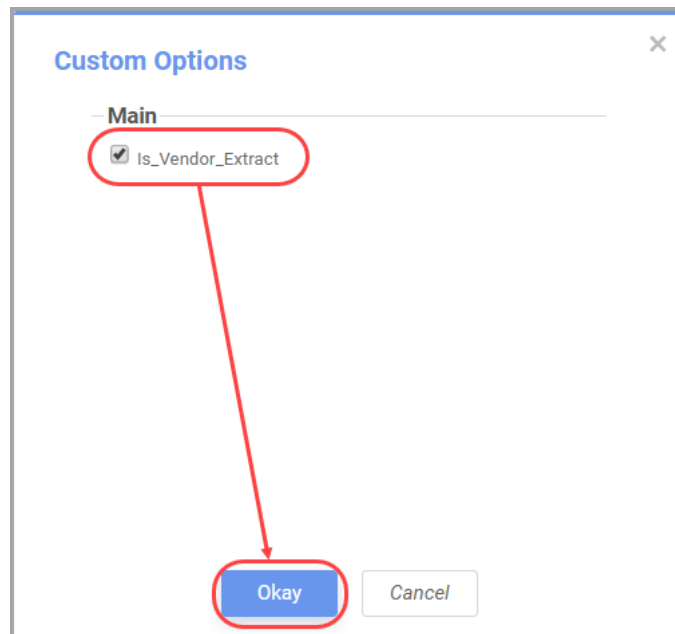
The report is now set up for FTP.

Setting Up FTP Server

Navigation: StudentInformation > Management > District Administration > Vendor Extract Report Config

Before you can complete this procedure, the (S)FTP server should already be set up for (S)FTP and you should have the credentials on hand.

1. With a district in context, on the **Vendor Extract Report Config** screen, click **Add Configuration**.

The **Add Configuration** window opens.

2. Enter the appropriate credentials in the fields.

   - **Report Name** – Select a report that has the **Is_Vendor_Extract** checkbox selected.

     *Note: Only reports with the **Is_Vendor_Extract** checkbox selected display in this list (see "Setting Up Reports"). If there are no reports with **Is_Vendor_Extract** selected, nothing displays.*

   - **Host** (required) – Enter the name of the host.
   - **Port** (required) – Enter the port number.

- **Protocol** – Select SFTP or FTP.
- **Encryption** (displays only if you select FTP) – Select the type of encryption to use.
- **Username** (required) – Enter the username for the FTP server.
- **Password** (required) – Enter the password for the FTP server.
- **Remote Directory** – Enter the remote directory to which the transfer file is sent.
- **Remote Filename** – Enter the remote file name that displays after the transfer completes.

3. Click **Test Connection** to verify that the credentials are accurate. If you receive an error message, ensure the credentials you have are correct and entered correctly.

   Note: If you are unable to verify the connection, you can still save the configuration and return to it at a later time when you have the correct credentials. In the meantime, the report will not be sent via (S)FTP until the correct information is entered.

4. Click **Save Configuration**.

   A confirmation message displays, and the new configuration is added to the grid.

You can now run the corresponding report or wait for the scheduled report to run, which automatically transfers via (S)FTP.

Creating Express View Reports

Express View reports let users easily create reports with a drag-and-drop interface. Only a single category can be used for such reports (see the *Reporting Category Information* document to determine the category that best fits the report you wish to make).

More information on creating Express View reports can be found in the links below:

- [Creating an Express View report](#)
- [Managing data](#)
- [Formula columns](#)
- [Customizing appearance](#)
- [Making visualizations](#)
- [Grouping and summarizing data](#)
- [Data categories and fields](#)
- [Exporting options](#)

Creating Advanced Reports

Advanced reports let users create comprehensive reports for various needs. It is recommended that you use only a single category when creating reports unless you are extremely familiar with Joins (see the *Reporting Category Information* document to determine the category that best fits the report you wish to make).

More information on creating Advanced reports can be found in the links below:

- Report Designer
- Categories
- Sorts
  - *"Creating User-Friendly Sort Names"*
- Filters
  - *"Creating User-Friendly Filter Names"*
- Group Min/Max Filters
- Top/Bottom Filters
- Report Options
- Templates
- Joins
- Cell Formatting
- Sections
- Using the Toolbar
- Design Grid
- Drilldowns

Creating User-Friendly Sort Names

1. When adding or editing an advanced report, in the Designer pane, click ⚙, hover your cursor over **Options**, and then click **Report Viewer**.
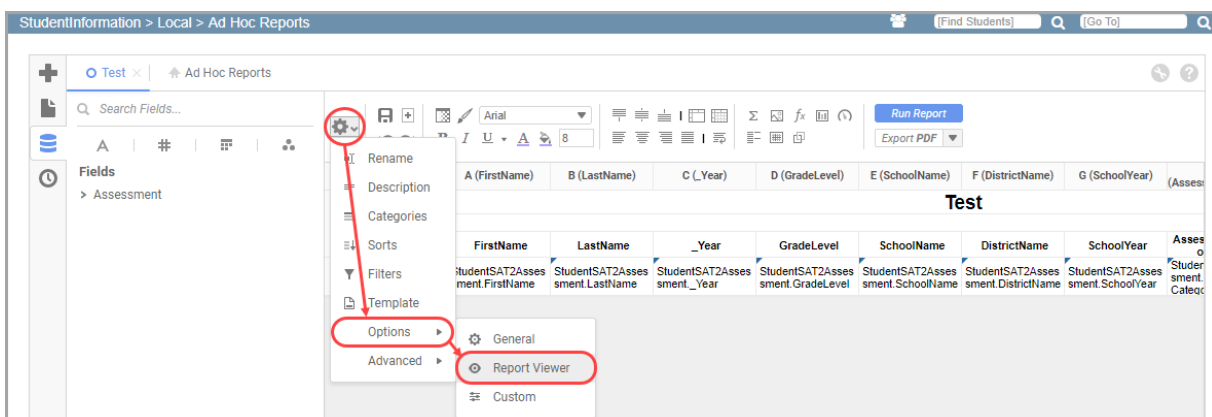
The **Report Viewer Options** window opens.

2. Click the **Sorts** tab.

3. In the grid that displays, in the **Title** column, enter the user-friendly sort name(s) you wish to display in the post-filter pane.

4. Click **Okay** to save your changes.
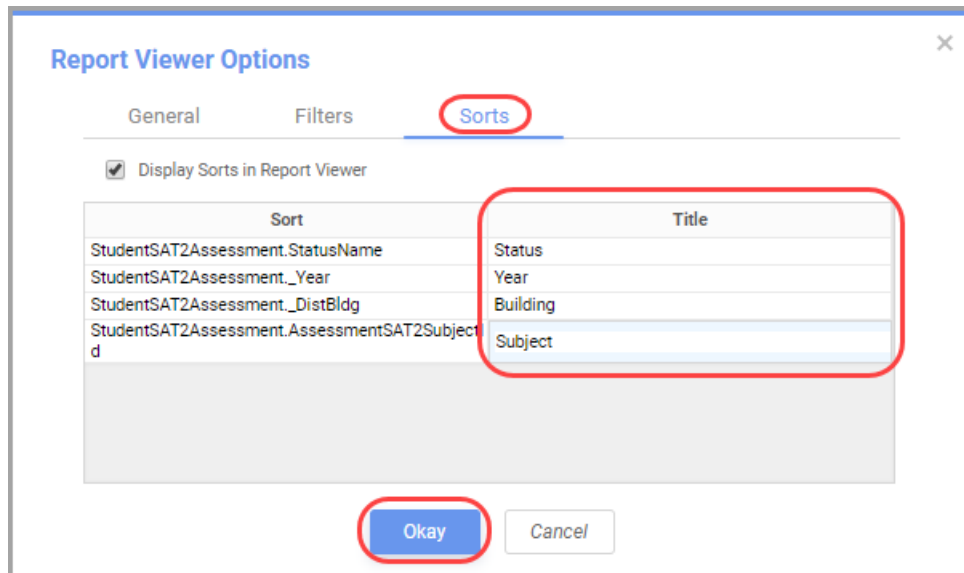
The user-friendly sort names now display in the post-filter pane.

Creating User-Friendly Filter Names

1. When creating an advanced report, in the **Filters** tab, once you have selected the filters that you wish to use and arranged them in your preferred order, in the **Title** column, enter the user-friendly filter name(s) that you wish to display when a user runs the report.

2. Click **Next** to proceed to the **Layout** tab, or click **Save and Close** to save your changes and exit the report.
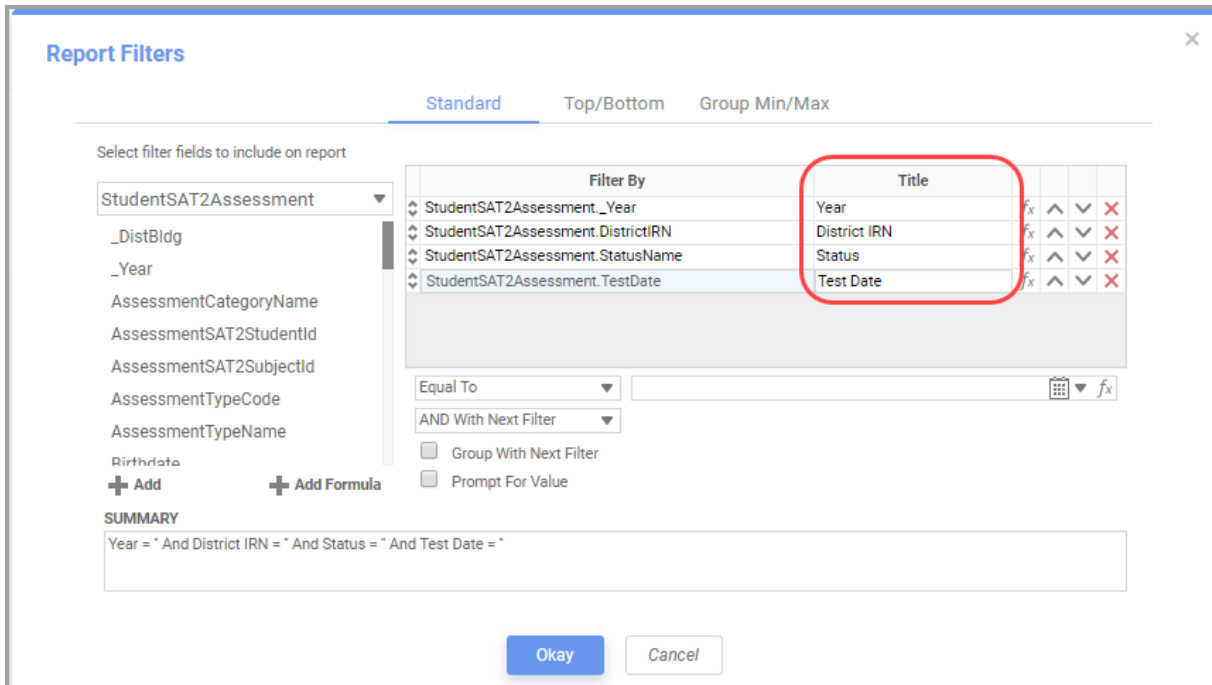
The user-friendly filter names now display when a user runs the report.

Security

Reporting defines multiple roles that determine the type of access accounts have to various reporting features. Each role has preset site access and resource permissions that should not be modified. However, you can create any number of additional roles with different resource permissions based on the needs of your district. You must assign a role to all accounts to which you want to grant access to Reporting. All roles are assigned in StudentInformation. For more information about security, see the *ProgressBook StudentInformation Security Guide*.

For more information on Reporting security, refer to the appropriate topic:

- *"Preset Account Roles"*
- *"Resource Permissions"*
- *"Creating Additional Roles"*

Preset Account Roles

You can assign any role to an individual account, multiple accounts, or a group in StudentInformation.

Reporting Account Roles in StudentInformation

ITC-Level Role	Abilities
AH-ITC Report Manager	• Create and edit all report types • View and modify the contents of all report folders • Schedule and run all ITC- and district-level reports
District-Level Roles	**Abilities**
AH-Full Admin Report Manager	• Create and edit all report types • View and modify the contents of all district-level report folders • Schedule and run all district-level reports
AH-Full Admin Report Writer	• Create and edit all report types • View the contents of all district-level report folders • Schedule and run all district-level reports
AH-Full Report Writer	• Create and edit all report types • View the contents of all non-admin district-level report folders • Schedule and run all non-admin district-level reports
AH-Full Admin Viewer	• View the contents of all district-level report folders • Run all district-level reports
AH-Full Viewer	• View the contents of all non-admin district-level report folders • Run all non-admin district level reports
Folder-Specific Roles	**Abilities**
AH-Scheduler	• Create and edit all report types • Schedule reports to which the account has access
AH-Vendor Extracts Admin Viewer	• Create and edit all report types • Run all reports within the Vendor Extracts folder

ITC-Level Role	Abilities
AH-Vendor Extracts Viewer	• Create and edit all report types • Run all non-admin reports within the Vendor Extracts folder
AH-[folder name] Admin Viewer	• Run all reports within the specified folder name (i.e., **Assessment**, **Attendance**, **Discipline**, **Eligibility**, **EMIS**, **Fees**, **Marks**, **Medical**, **Scheduling**, **School**, **Staff**, **Student**, and **Year End**)
AH-[folder name] Viewer	• Run all non-admin reports within the specified folder name (i.e., **Assessment**, **Attendance**, **Discipline**, **District Shared**, **Eligibility**, **EMIS**, **Fees**, **Marks**, **Medical**, **Scheduling**, **School**, **Staff**, **Student**, and **Year End**)

For more information on account roles, refer to the appropriate topic:

- *"Assigning a Role to an Individual Account"*
- *"Bulk Assigning a Role to Accounts"*

Assigning a Role to an Individual Account

Navigation: StudentInformation > Management > Security > View Accounts

1. On the **View Accounts** screen, enter information in any of the search fields to find the account to which you want to assign a Reporting role.

2. Click **Search**.

3. In the results grid that displays, in the row of the appropriate account, click ✏.

The user record screen **Account** tab displays.

4. On the bottom half of the screen, click the **Roles** tab.

5. In the **School** drop-down list, select **All Buildings**.

   Note: *Although the role is assigned at the **All Buildings** level, Reporting is available to users only at the district(s) to which they have access.*

6. In the **Role** drop-down list, select the corresponding role that grants the access needed.

   Note: It is recommended that you assign only 1 Reporting role to an account.
   Assign the highest level role that best suits the account, or create your own.

7. Click **Add Role**.

   The new role and its corresponding school display in the grid.

   Note: To remove a role from an account, in the row of the role you want to
   remove, click 🗑 .

Bulk Assigning a Role to Accounts

Navigation: StudentInformation > Management > Security > Assign Role to Accounts

1. On the **Assign Role to Accounts** screen, in the **School** drop-down list, select **All Buildings**.

   *Note: Although the role is assigned at the **All Buildings** level, Reporting is*
   available to users only at the district(s) to which they have access.

2. In the **Role** drop-down list, select the role you want to assign to multiple accounts.

   Note: It is recommended that you assign only 1 Reporting role to an account.
   Assign the highest level role that best suits the account, or create your own.

3. In any of the following fields, enter or select search criteria to locate the account(s).

   • In the **Last Name**, **First Name**, **Email Address**, and **Username** fields, enter a partial or full value by which to search.

     *Note: Use * as a wildcard before, after, or in between keywords to narrow*
     your search results. The search is not case sensitive.

   • **Domain** – Select the domain associated with the account(s) for which you are searching.
   • **Administrative School** – Select the administrative school associated with the account(s) for which you are searching.
   • **Default School** – Select the default school associated with the account(s) for which you are searching.

4. Click **Search**.

A dual listbox of account usernames whose information matches your search criteria displays.

5. In the **Available** listbox on the left, select the accounts to which you wish to assign the selected role, then click ➡ to move them to the **Assigned** listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrows icon to move accounts between the 2 listboxes.)

6. Click **Save Assigned Accounts**.

A success message displays.

Resource Permissions

Navigation: StudentInformation > Management > Security > View Roles > Add New Role button or View Details icon > Edit Resource Permission button

Resource permissions determine the privileges associated with each Reporting role. To access these permissions, complete the following steps:

1. On the **View Roles** screen, in the **School** drop-down list, select **All Buildings**.

2. In the **Role Name** field, enter "AH-." Then, click **Search**.

The Reporting roles display.

3. In the row of the role for which you want to see resource permissions, click ✏.

   The **Security - Role: [role name]** screen displays.

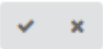4. Click **Edit Resource Permissions**.

The **Edit Permissions for [role name]** screen **Reports** tab displays with the resource permissions for the selected role.

For more information on resource permissions, refer to the appropriate topic:

- *"Access Settings"*
- *"Resource Permission Features"*
- *"Creating Additional Roles"*

Access Settings

Reporting resource permissions display with up to 2 access settings in front of each node (**View**, **Update**, and **Create**). The Reporting resources display alphabetically within each level of the hierarchy. You can expand and collapse each node by clicking ▶ and ▼. Access for a node can be toggled among Enabled, Disabled, and Neutral. You can also see hierarchical access for items that are not expanded (Enabled below, Disabled below).

- Enabled   – Indicates that the account with this role can access this resource and any other resource nested below this node.

- Enabled below   – Indicates that the account with this role can access at least one resource nested below this node.

- Disabled   – Indicates that the account with this role cannot access this resource nor any other resource below this node.

- Disabled below   – Indicates that the account with this role cannot access at least one resource nested below this node.

- Neutral   – Indicates that access is neither allowed nor restricted for this node.

  Note: *Once you have enabled or disabled access to particular features for a role, be sure to click* ***Save Permissions****.*

Resource Permission Features

Reporting resource permissions are composed of features that determine which reports the account can access and what actions a user can take within the application.

All Data Objects – Controls whether the role can access all categories to create or edit reports, even if they do not have access to any particular folder.

Report Folders – Controls whether the role can **View** all folders and their relevant categories for creating custom reports; controls whether the role can **Update** the contents of all report folders (i.e., save custom reports to the folders).

[Folder name] – Controls whether the role can **View** the corresponding report folder (but not the reports in the **Admin** subfolder) and its relevant categories for creating custom reports; controls whether the role can **Update** the contents of the corresponding report folder (i.e., save custom reports to the folder), but not reports in the **Admin** subfolder.

> *Note: The **District Shared** resource lets users within the district **View** and/or **Update** the contents of the **District Shared** folder. Districts who wish to share reports with specific users without granting them access to everything within a folder can assign this resource.*

[Folder name] (Admin) – Controls whether the role can **View** reports in the corresponding **Admin** subfolder; controls whether the role can **Update** the contents of the corresponding **Admin** subfolder (i.e., save custom reports to the subfolder).

Report Scheduler – Controls whether the role can schedule reports.

Report Types – Controls whether the role can create the following types of reports:

- Advanced Reports
- Chained Reports
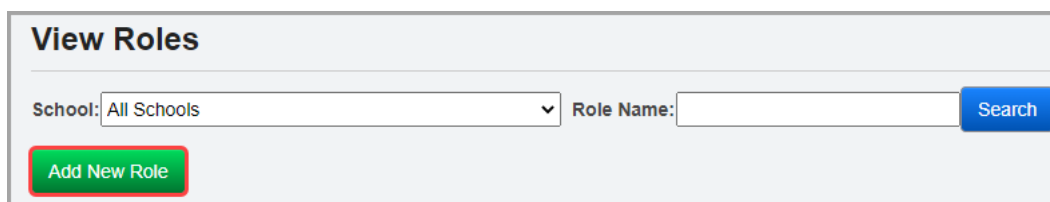- Crosstab Reports
- Express Reports
- Express Views

Creating Additional Roles

Navigation: StudentInformation > Management > Security > View Roles

You can create additional roles with unique resource permissions to fit the needs of your district. To create a new Reporting role, complete the following steps:

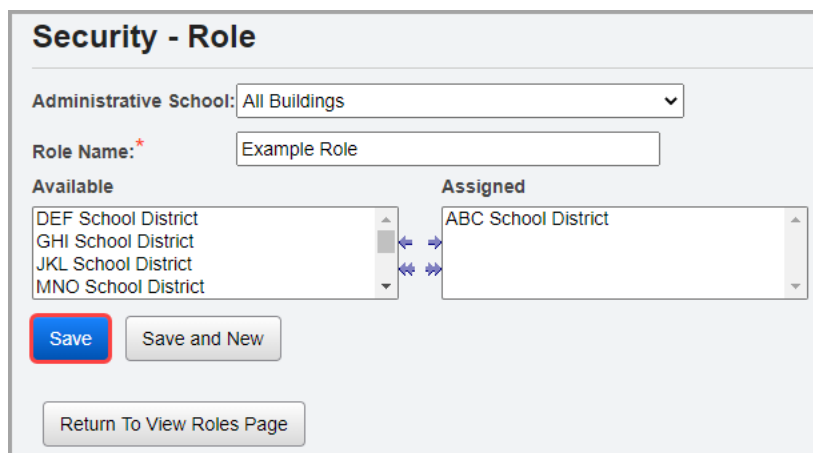1. On the **View Roles** screen, click **Add New Role**.

   The **Security - Role** screen displays.

2. In the **Administrative School** drop-down list, select the ITC, district, or school building that should have access to edit the role.

3. In the **Role Name** field, enter a name.

4. The **Available** and **Assigned** listboxes let you specify the buildings and/or districts to which the role grants access. In the **Available** listbox on the left, select the school(s) and/or district(s) to which the role should have access, then click ➡ to move them to the **Assigned** listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move schools or districts between the 2 listboxes.)

   Note: To deselect a location, click on the location, and then click ⬅ . To deselect all locations, click ⬅⬅ .
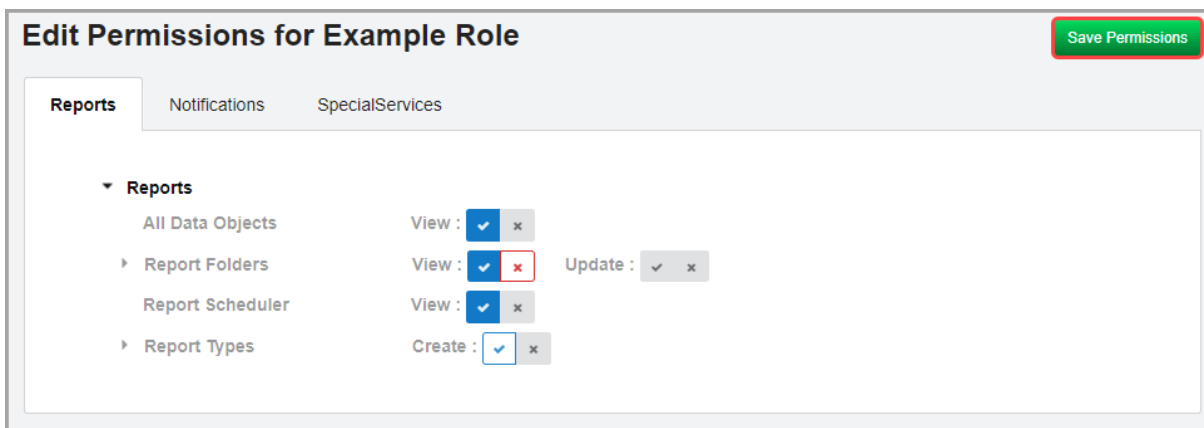
5. Click **Save**.

A success message displays and the screen title now displays as **Security - Role: [role name]**.

6. Click **Edit Resource Permissions**.

   The **Edit Resource Permissions for [role name]** screen **Reports** tab displays.

7. Modify the resource permissions as desired (see *"Resource Permissions"*).

8. Click **Save Permissions**.

You can now assign this Reporting role to any account.