Best Practices for Naming/Creating Report Templates

This document is for any Skyward Web Student Management users, and covers best practices for naming and/or creating Skyward report templates. It covers the following:

1. An overview of Skyward report templates
2. Types of templates
3. Sharing/cloning templates
4. Templates that are year-specific
5. Templates that are term-specific
6. Templates that are/are not grade-specific
7. Templates that Post information
8. Cleaning up templates
9. Overview of naming conventions

1. An overview of Skyward report templates

You will, as a Skyward user, create a number of report templates throughout the system. Some might be used daily/weekly, while others are used once or twice a year. Other staff members may also need some of the same reports you do and it's not always necessary for each of you to create your own templates. If someone else creates a report that meets your criteria, you can just run that person's template. If it's almost, but not quite what you need, you can clone their template and make the necessary changes. Because you might not be looking at your reports regularly, and because someone else may need the same report you've created, it's important/helpful to give your reports a name as precise as possible. Below are some **best practices** for creating/naming report templates

2. Types of templates

There are 3 different types of report templates: User, Entity or Skyward

Template Type ▲	Description	Created By
1) User	Q1 GPA	Kimball, Barbara
2) Entity	Q2 GPA	Kimball, Barbara
4) Skyward	Presidential Academic Award	Kimball, Barbara

- **User:** a User template is one that you have created yourself and have not shared
- **Entity:** an Entity template is one that you – or someone else – has created and selected the option to share it with others in the same building
- **Skyward:** a Skyward template is one that Skyward created on your behalf. Even though it shows it was created by you, it really wasn't. Therefore, you cannot edit it to make any changes to it

You can Edit, Clone and Print your own templates
You can View, Clone and Print other peoples' templates. You cannot Edit them
You can View, Clone and Print the Skyward templates created for you. You cannot Edit them

3. Sharing/cloning templates

Sharing templates:

When you create a report, it's always a good idea, for a number of reasons, to share the template with others:
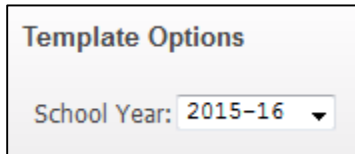
- If you've already created a report that someone else needs, they can just run yours if you've shared it
- If you need help troubleshooting a report issue, the RESA can see it and the parameters you have set up
- If a report has been run that affects something (by changing data), it's hard to find/figure out if someone else can't see your report and the options that were selected

Cloning templates:

- Let's say someone else has created a template called 15-16 S1 9th Grade GPA. You need the same report, but for 10th grade. Rather than recreating the report from scratch, you can clone the 9th grade template, give it a name referencing 10th grade, and, from within the report, change the grade level to 10. If you need the report for 9th grade, though, all you have to do is run the other person's report

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4. Templates that are year-specific

Within some report templates you'll find a School Year dropdown menu:
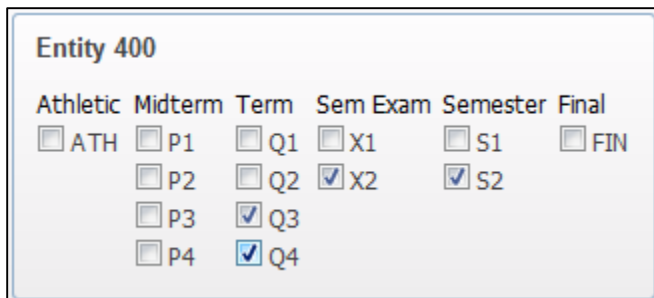

When creating templates with this option, it's a good idea to include the year in the name of your template. Why? So that when 16-17 comes around, you know that you need to change something in your template for the new-year. **Example**: 15-16 S1 Report Cards

Note: best practice is to put the school year at the front, so that all templates for the year are grouped together

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5. Templates that are term-specific

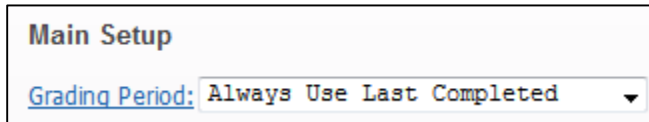Within some report templates there will be areas that are specific to a term(s):

When there is no school year in the template, that particular report can only be run for the current year. Therefore, no year reference is needed in your template description, which means there's nothing you need to change for next year. You should, however, indicate what term the report is for. **Example**: S1 Honor Roll
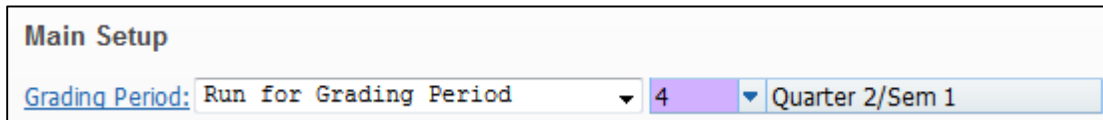
Note on Grading Period options:
Within some reports there are options asking what Grading Period to use: Always Use Last Completed or Run for Grading Period. What's the difference?

When **Always Use Last Completed** is selected, regardless of what term you're in, it's going to report on the last completed term. **Example**: you just finished Q3 and need to a report card for Q1. If your template is set to Always Use Last Completed, when you run your Q1 template, it will report on Q3

When you create a template for a specific grading period, your option should be set to run for that particular grading period. **Example**: my template is called S1 Honor Roll. Therefore, I want to set my report to **Run for Grading Period Quarter 2**. Then, regardless of when I run it, it will always report on S1

6.   **Templates that are/are not grade-specific**

Templates that <u>are</u> grade specific:
Within some reports you may want to report on just a subset of the grade levels in your building. For example, I need a report for just 11th and 12th grade students. It's helpful to indicate this in your template name for the following reason:

You create a template this year called **15-16 11th & 12th Grade Honor Roll**. When you create the report it populates the grad year based on the grade levels you enter. Example, I enter 11 and 12, and the system enters 2017 and 2016:

11 **[2017**]   to 12 [**2016**]

However, when the RESA runs the year-end processes, the report keeps the grad year, but changes the grade. Therefore, next year, my 11th & 12th Grade Honor Roll will now show parameters that look like this, because students with a Grad Year of 2017 are now 12th graders, and those with a Grad Year of 2016 are now graduated:

12 [**2017**] to GD [**2016**]

In this example, you would also want to include the school year in your template name so that you know you need to change something when next year rolls around

Templates that <u>are not</u> grade specific:
When you're running a report for all your grade ranges, you should not include the grade ranges in your template. For example, if my building is 6-8, and I want to run a report for $6^{th} – 8^{th}$ grade students, I don't want to/need to include this in my grade ranges. Why? For the reason referenced above: next year your template will now show 7-9 grade for your grade ranges. If you leave the grade ranges open, you won't need to change these fields next year

7. Templates that Post information

In some reports, there are options that will cause you to post information if they're checked when you run the report. For example:

 (in Report Cards)

 (in Student Rank)

You might want to post report cards to family/student access, but it's a good idea to preview them prior to posting them. If this option is checked in your report card template, every time you run that report you'll be creating another report card record in student/family access. You won't necessarily remember, when you run the report, if this option is on or not. Therefore, it's a good idea to have 2 separate templates, each of which indicate what the report is going to do. **Example**:

8. Cleaning up templates
For various reasons, it's a good idea to clean up old/vaguely named templates when you come across them. If you see one that you don't know what it's used for, delete it. If it's one you use but is rather generic, rename it

9. Overview of naming conventions

- **15-16 S1 Report Card**: inclusion of the year tells me I need to change something in this from one year to the next
- **S1 Honor Roll**: no school year tells me it can only be run for the current year and I don't need to change anything from one year to the next

- **15-16 11th & 12th Grade Honor Roll**: inclusion of the school year here tells me that I need to change something next year. In this case, it would be the grade ranges, and, possibly, the school year
- **S1 Student Rank – Post**: inclusion of the word Post tells me that if I run this report I will be posting information somewhere. Therefore, I would want to run the report-only version of this report prior to posting it to make sure everything looks good