

ENTERPRISE REPORTS - GETTING STARTED

This document is an introduction to Enterprise Reporting for administrators. Users will learn how to navigate to Enterprise Reports, select a published report, and choose a report view. Basic functions such as filter, search, and saving a custom version of an existing report will be addressed.

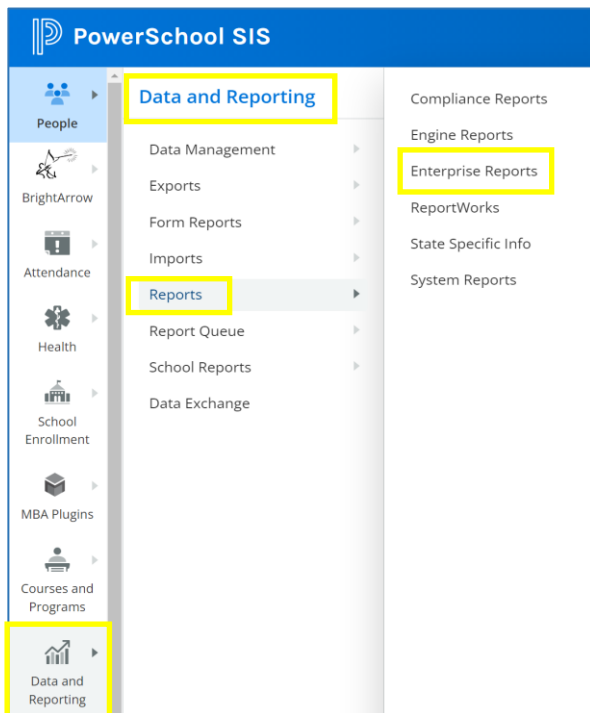
Enterprise Reporting is a permission-based reporting tool. Consult your district administrator to gain access to Enterprise Reporting as necessary.

OVERVIEW

- **Getting Started with Enterprise Reports in PowerSchool**
- **The Contact Relationship Details (v2.0) Enterprise Report will be used for example purposes**
 - Step 1: NAVIGATE to Enterprise Reports
 - Step 2: SELECT, OPEN, and CHOOSE an Enterprise Report View
 - Step 3: FUNCTIONS: Filter and Search
 - Step 4: SAVE an END USER created CUSTOM VIEW of an Enterprise Report

1. Navigate to Enterprise Reports

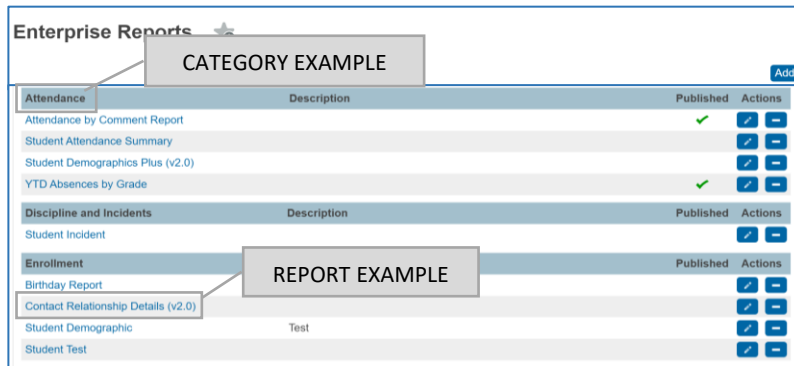
- [SCHOOL > DATA AND REPORTING > DATA AND REPORTING > REPORTS > ENTERPRISE REPORTS](#)



2. Select, Open, and Choose an Enterprise Report

- Enterprise Reports are grouped by CATEGORY

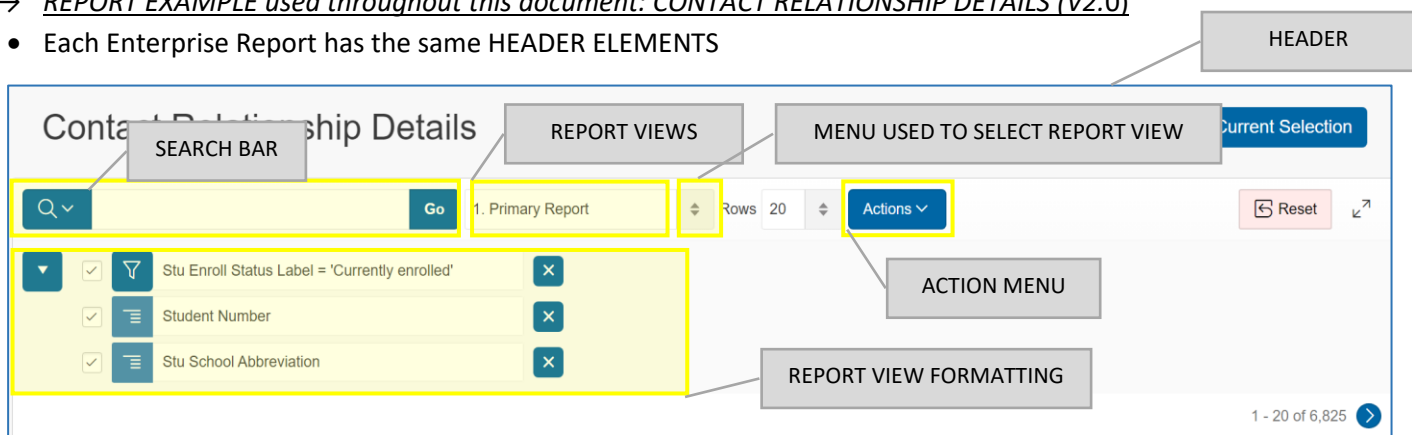
- Additional CATEGORIES cannot be added, however, existing CATEGORIES may be renamed by an administrator



□ Report HEADER elements

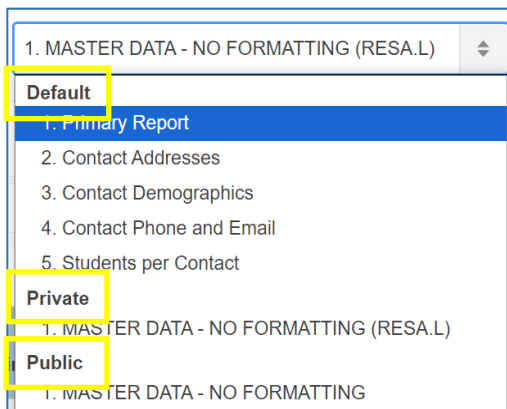
→ REPORT EXAMPLE used throughout this document: CONTACT RELATIONSHIP DETAILS (V2.0)

- Each Enterprise Report has the same HEADER ELEMENTS



□ Select a REPORT VIEW

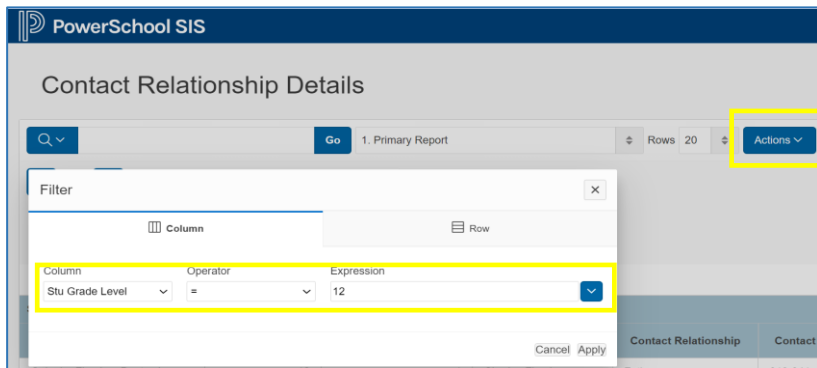
- Select the UP/DOWN ARROW icon next to the REPORT VIEW field
- Typically, each Enterprise Report will have PRE-DEFINED report VIEWS listed under the title DEFAULT
- END-USER created CUSTOM VIEWS made PUBLIC will be listed under the title PUBLIC
- END-USER created CUSTOM VIEWS that are NOT made PUBLIC will be listed under the title PRIVATE



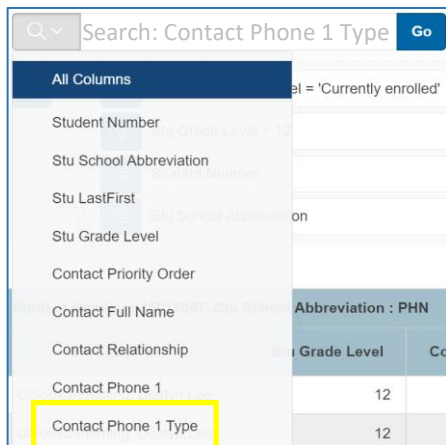
- Select PRIMARY REPORT under the title DEFAULT

3. Functions: Filter and Search

- Users have MULTIPLE opens to FILTER Enterprise Report Views, this document focuses on one type of FILTER
 - EXERCISE: Add a FILTER to search only 12th Grade Students
 - Select the ACTIONS element from the report HEADER
 - Choose FILTER
 - Under COLUMN, use the drop down menu to select STU GRADE LEVEL
 - Under OPERATOR, use the drop down menu to select =
 - Under EXPRESSION, use the drop down menu to select 12
 - Select APPLY
- * RESULT: CONTACTS appear for students in 12th grade ONLY



- Similar to FILTERS, users have MULTIPLE options to SEARCH for criteria, this document focus on one type of SEARCH using the SEARCH BAR
- EXERCISE: Perform a SEARCH for all MOBILE phone numbers
 - Select the MAGNIFYING GLASS to the left of the SEARCH BAR
 - * NOTE: The DROPDOWN menu that appears from selecting the MAGNIFYING GLASS, opens options that correlate to COLUMN NAMES
 - Select CONTACT PHONE TYPE 1
 - Type MOBILE in the SEARCH BAR
 - * NOTE: once you start typing MOBILE, the grey text will disappear
 - Choose GO



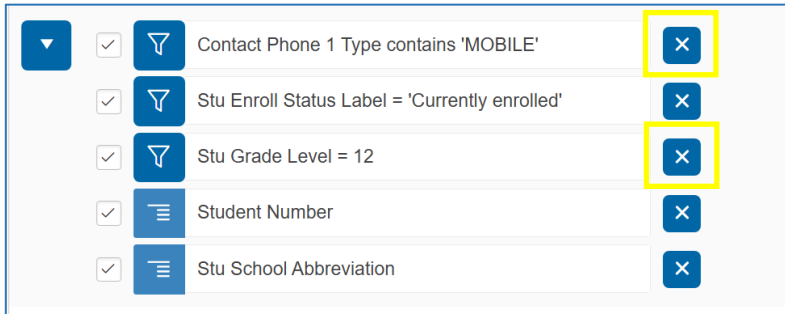
* RESULT: CONTACTS with a MOBILE phone for CONTACT PHONE 1 TYPE appear for 12th grade students ONLY

To REMOVE the SEARCH criteria AND Report View FILTER do ONE of the following

- #1: Select the RESET icon (far right in the REPORT HEADER)



- #2: Select individual SEARCH and/or FORMATTING options
 - SELECT the X ICON next to CONTACT PHONE 1 TYPE CONTAINS 'MOBILE' under the SEARCH BAR
 - SELECT the X ICON next to GRADE LEVEL =12 under the SEARCH BAR



4. Save an End User Custom Report View

Complete STEP #3 once again

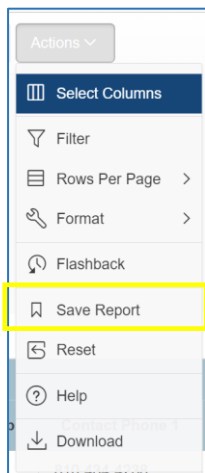
* DO NOT SELECT RESET OF REMOVE THE FILTER AND SEARCH

End users have the ability to save a CUSTOM Report View as PUBLIC or PRIVATE

- It is recommended that the end users save their original CUSTOM Report View as PRIVATE to ensure the report can be recovered
- Keep in mind that ANY PUBLIC Report View is available for ALL Enterprise REPORTS to view AND edit

Save the Custom Report View from STEP #3 as a PUBLIC Report View

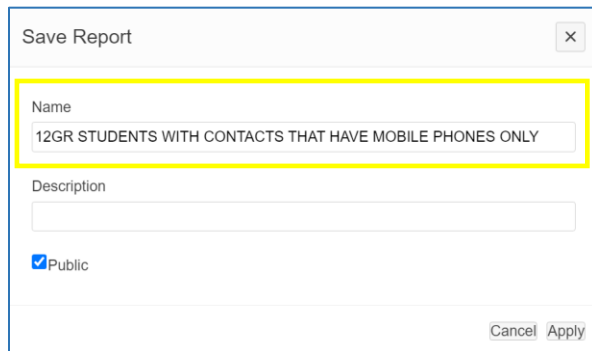
- Open the ACTIONS menu and select SAVE REPORT



- Enter a NAME for the REPORT

→ Best practice is to ADD your INITIALS at the end of the REPORT NAME

- Place a CHECKMARK next to PUBLIC



Save Report

Name
12GR STUDENTS WITH CONTACTS THAT HAVE MOBILE PHONES ONLY

Description

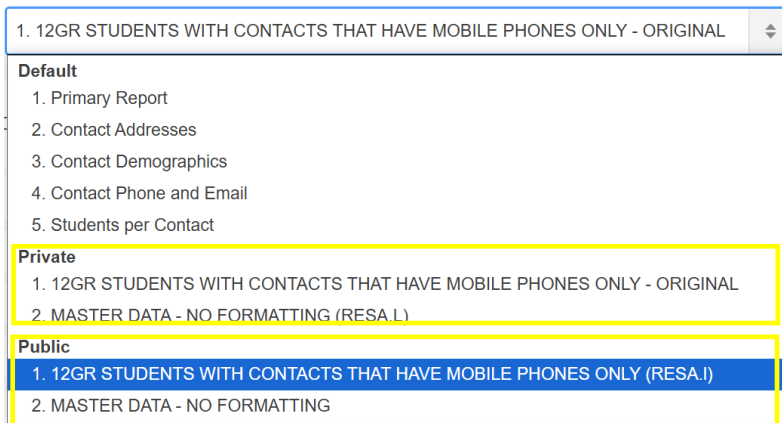
Public

Cancel Apply

- Select APPLY

□ Save the Custom Report View from STEP #3 as a PRIVATE Report

- Open the ACTIONS menu and select SAVE REPORT
- Enter a NAME for the REPORT
 - Best practice for naming a PRIVATE REPORT is to add “- ORIGINAL” at the end of the EXISTING Report View NAME
 - Example: 12GR STUDENTS WITH CONTACTS THAT HAVE MOBILE PHONES ONLY - ORIGINAL
- DO NOT select the PUBLIC CHECKBOX
- Select APPLY
 - * RESULTS: Each REPORT VIEW has an ORIGINAL copy stored under the TITLE: PRIVATE
 - * RESULTS: Each REPORT VIEW has a PUBLIC copy stored under the TITLE: PUBLIC



1. 12GR STUDENTS WITH CONTACTS THAT HAVE MOBILE PHONES ONLY - ORIGINAL

Default

1. Primary Report
2. Contact Addresses
3. Contact Demographics
4. Contact Phone and Email
5. Students per Contact

Private

1. 12GR STUDENTS WITH CONTACTS THAT HAVE MOBILE PHONES ONLY - ORIGINAL
2. MASTER DATA - NO FORMATTING (RESA.L)

Public

1. 12GR STUDENTS WITH CONTACTS THAT HAVE MOBILE PHONES ONLY (RESA.I)
2. MASTER DATA - NO FORMATTING

For Additional assistance with Enterprise Reports, Actions, Saving, etc. reach out to RESA for guidance. Submit a support ticket to sissupport@sccresa.org