



Focus University Training Document

Pre-Scheduling 1-Portal Page, Menus, Searching for Students, Student menus

2016

Training Agenda

- **Portal Page**
 - Alerts
 - Messages
 - Upcoming events and calendar
 - Focus University
 - Featured Programs
 - Find a student
 - Portal Header information
 - Portal Footer information
- **Menus**
 - Setup Menu
 - Students Menu
 - Users Menu
 - Scheduling Menu
 - Grades Menu
 - Assessment Menu
 - Attendance Menu
 - Eligibility Menu
 - Discipline Menu
 - Reports Menu
 - Florida Menu
- **Student Sub-menus**
 - Demographics
 - Enrollment
 - Schedule
 - Requests
 - Grades
 - Absences
 - Referrals
 - Test History

Purpose: The first step to understanding the Focus SIS is to become familiar with the portal page, menus, tabs and searching functions. This document provides the user with a framework for the navigation of the user portal page, student demographic data, as well as the ability to understand what each menu contains and what the grey student sub-menus house when searching for appropriate student data.

Objectives:

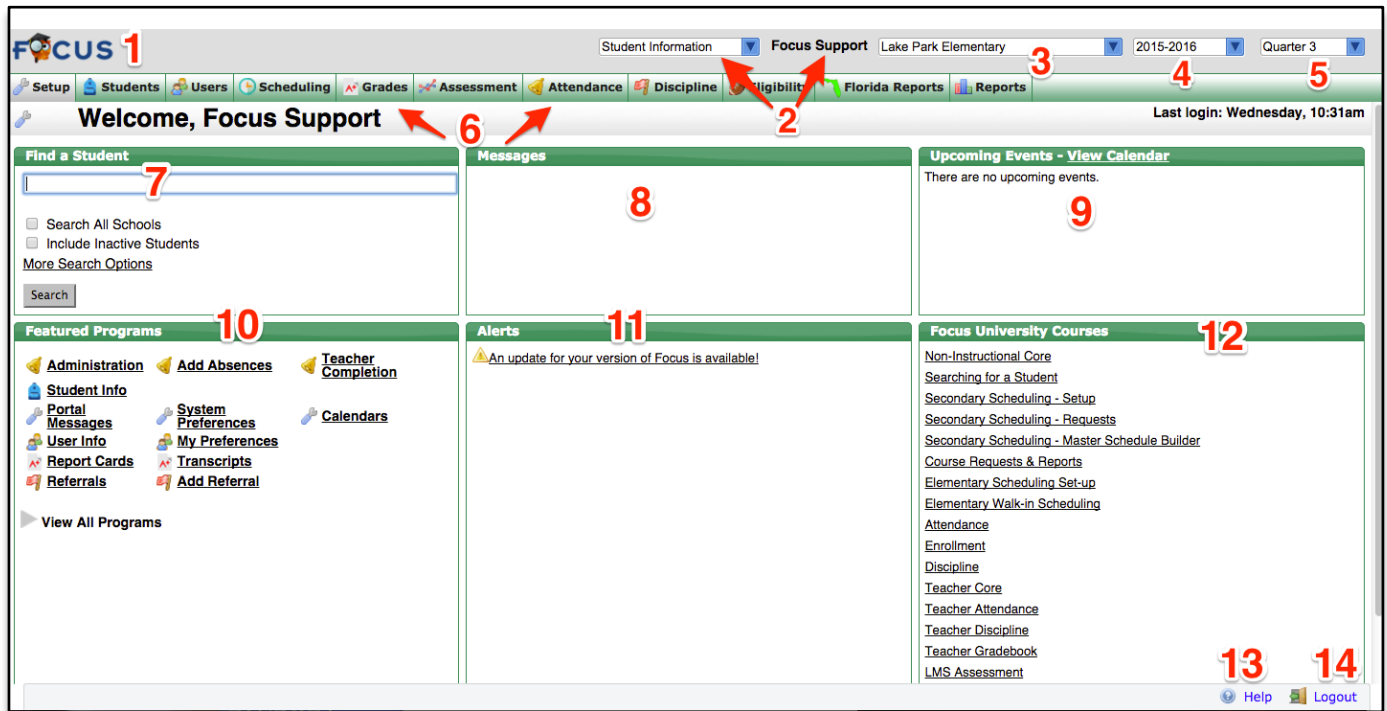
- Accessing Student Information via the Portal Page
- Understand How to Navigate the Demographic Tabs within Student Info
- Access and Interpret Student Enrollment Records and Schedules
- View Student Schedules and Requests
- View Student Final Grades and Test History
- Locate Student Attendance and Referrals

Training Site URL:

train.focus.collierschools.com

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Home Portal Page



Options in header of page

1. **Focus Logo (top-left)** – Click on the logo return to the portal page (district logo will appear on production site)
2. **User Name/Role** – Displays the user's name and a pull down if the user has multiple profiles.
3. **School list pull-down** – If the user has rights to more than one school, this will be a pull-down
4. **School year pull-down** – Navigates between the current year and prior/future years.
5. **Marking Period pull-down** – Displays a list of available marking periods during the school year. Defaults to the currently active marking period.
6. **Main Menu**- Drop down menus that allows users to navigate to different screens within Focus.

Options in the center of the page

7. **Find a Student box**- Users can search for a student from the portal page by entering part of the first or last name or the student's ID number.
8. **Portal Messages**- Messages from school based administrators and/or district.
9. **Upcoming Events**-District calendar of upcoming events
10. **Featured Programs**-Quick links to the Focus menus (#6). Programs displayed are profile-based.
11. **Alerts**-Profile based system alerts e.g., teachers that have not taken attendance, referrals, etc.
12. **Focus University Courses**-Online training videos available for users to review as needed (profile-based).

Options in the footer of the page

13. **Help**
 - Provides Contextual help for open page
 - Links to Focus University; allows users to sign up for a Focus University account and receive email notice
 - Can be opened in a new window

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14. Logout

- Closes the Focus application
- Focus time-out is 24 minutes of inactivity

ACTIVITY

1. Use the **Upcoming Events** box to view the calendar for the school/district. Are there any events coming up this month? What indicates days that school is in session?
2. What button does a user select to navigate back to the portal page from any other screen?
3. What are possible alerts that might be seen in the alerts box?

MENU OPTIONS (options displayed are based on user profiles)

On the Focus portal, click on each of the bolded items listed below to view the contents of the menu. Users may see more or less than the items listed below; this training is just an overview of the most common features applicable to schedulers.

❑ SETUP

Portal Messages

Portal Messages are displayed on the main portal page. These messages can be created to display for:

- A specific timeframe
- Selected profile(s)
- A school or district wide (based on profile permissions)

School Setup

- Marking Periods
- Calendars
- Periods (Bell Schedule)

❑ STUDENTS

Mass Assign Student Info

If groups of students all need to have information changed, users can use the Mass Assign Student Info feature.

Mass Add Log Records

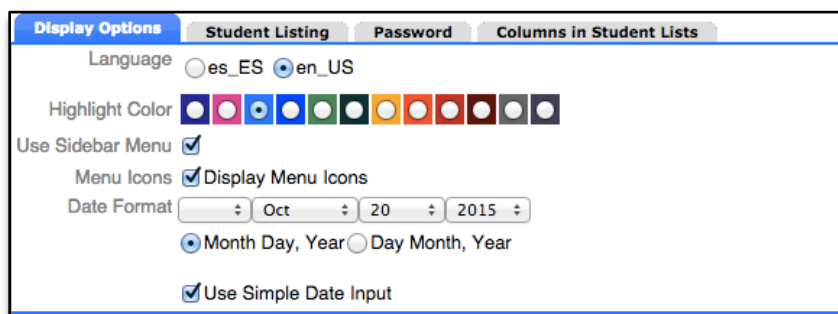
Gives users the ability to mass add certain logging fields e.g., Immunizations & Physicals, Medical Alerts, and Nurse Visits.

Reports

- **Advanced Report** – Creates a report specific to the student fields and data selected by the user running the report. The user can save the report to be used in the future.
- **Add/Drop Report** - View a full listing of each student enrolled or withdrawn during a user-specified timeframe.
- **Student Breakdown** - Column, pie and list charts on all types of student data. Click “Please choose a student field” and pull-down to any student data housed in Focus. Once a selection is made, a column, pie or list chart will appear.
- **Print Letters and Send Emails** - Provides a convenient way for users to send letters and forms to either a single person or multiple people at once. Formal, formatted letters can be created, saved, and reopened/edited directly within the Print Letters and Send Emails function, so the same letters and forms can be kept on hand for future use.

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❑ USERS MENU



- **My Preferences**

- **Display Options Tab**

- Allows users to change the language, menu locations, color, and date format of the Focus portal.

- **Student Listing Tab**

- Allows users to select how the students are sorted in the list view, what file type to export reports as, and set which student tab appears as a default when a student record is opened.

- **Columns in Student Lists Tab**

- Allows the user to set the columns to appear as a default in the "Customized" student lists generated during a search.

❑ SCHEDULING MENU

- **Student Schedule**

Displays the courses/sections the student is currently scheduled in for semesters and full year. Courses can be added and dropped from this screen. Fields such as Period-Teacher, Days, Term, Florida Fields, etc. can be edited if the user has the permissions turned on for their profile

- **Student Requests**

Course requests can be generated here by the marking period or the school year. The user can set the priority of the requests as well for scheduling purposes.

- **Mass Add/Mass Drop Course**

When entering requests for students, allows users to add a course or multiple courses to a specified group of students. Can also mass delete course requests from students

- **Requests Reports** – Requests Reports offers tools for planning sections of courses. Tabs include:

- Requests by course
 - Print Requests
 - Duplicate Requests
 - Students with Too Many Requests
 - Students with Too Few Requests

- **Builder Reports** - Builder Reports cover all aspects of scheduling—not only the courses and periods each school has set up, but also issues that arise after an administrator has run the Scheduler. This report is particularly valuable in assessing the match between demand for particular courses and sections against actual availability. Tabs include:

- Courses with too many requests
 - Courses with too few requests
 - Overlapping requests
 - Sections with 0 seats
 - Period counts
 - Overscheduled Teachers (Sections Per Day, Per Period and Consecutive Periods)

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- **Loading Reports** – Loading Reports informs how the scheduler has filled sections and student schedules after the Scheduler has been run. Tabs include:
 - Courses with unfilled requests
 - Overfilled sections
 - Under filled sections
 - Unfilled Requests
 - Percentage of students scheduled
 - Students with incomplete schedules
 - Students with conflicting schedules
- **Course Catalog**
Provides a comprehensive list of courses available to a district. Administrators are able to select which courses are active for a marking period, define short and long titles, course numbers, start and end dates, and a number of other criteria. The catalog is populated via import tools during the initial development of the Focus SIS for a specific district.
- **Courses and Sections**
Organized similarly to a file cabinet: Subject → Course → Section. The Subject is created by the district or at school level to organize the different Courses. Within the courses, sections are set up.
- **Create Packages**
Provides a quick and easy method for creating parent/child links for secondary courses as well as homeroom packages for elementary schools

☐ GRADES MENU

- **Final Grades, GPA, Class Rank**
Houses student course history for all terms that grades are posted. Course History can be manually added for students who transfer in from non-Focus districts or out-of-state.
- **Reports Cards**
Schools can view and print Report Cards using this option. When the Report Cards option is selected, a set of checkboxes and menus specific to report cards will display. Choose the items that apply. Select the template, the marking period, the order to print, and the students to print for.
- **Transcripts**
Similar to the Report Card, Transcripts also has a set of check boxes and menus to choose from. Typically used for non-official purposes and for students withdrawing to attend school out-of-state.
- **Missing Final Grades**-view a list of students for whom marking period grades have not been posted; list includes the courses and teachers
- **Graduation Requirements Report** – Provides comprehensive information on student progress toward satisfying graduation requirements.

☐ ASSESSMENT MENU

- **Test History**
Allows for tracking of students' performance on various types of standardized tests.
- **Test History Report**
This report allows the user to compare the performance of groups of students on a standardized test. The report tracks, the name of the test, date the test was administered, school year, grade level, and scores.
- **Performance Reports**
Each of the reports allows users to view student performance results in a variety of formats.

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☐ ATTENDANCE MENU

The reports available are profile-based. Schedulers typically have view-only access to a limited number of the attendance reports.

- **Attendance Chart**
Allows users to view records of student absences school-wide or by individual student.
- **Absence Summary**
Allows users to view school-wide attendance over a user-specified date range. This report shows the names of students absent during the timeframe, as well as the grade levels and attendance data. Individual students can be viewed by clicking on their name.
- **Perfect/Excessive Attendance**
Three reports in one, this report includes data to track students who may be skipping classes. Users define the threshold for perfect/excessive attendance and can define a timeframe for each report.
- **Teacher Completion**
Allows users to assess teachers' track record in reporting attendance on any given day.

☐ DISCIPLINE MENU

- **Add Referral**
Allows users to electronically submit a discipline referral.
- **Referrals**
Users can view the records of students referred for discipline. Users can view a "Simple List" of students with referring teachers, the infraction and the incident date. Clicking on a student from the list will open the referral form.

Discipline Reports

- **Students with Referrals**
Identifies students and the number of discipline referrals accrued. Users can define a date range as well as a minimum number of referrals as search criteria.
- **Category Breakdown**
Provides graphic representations of conduct data, enabling users to more easily chart or track trends in discipline referrals.
- **Referral Log**
Enables users to generate Referral reports on individual students, suitable for sending to parents or for counseling sessions with students.

☐ FLORIDA REPORTS MENU

- **FASTER**
Send and receive student transcripts electronically
- **Data Verification Reports**
Data Verification reports provides users with a mechanism to clean up data prior to date-certain for all Survey windows.
- **EWS**
View data on students based on the state's criteria for early warning.

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❏ REPORTS MENU

- **District Reports**-Provides links to run reports created by District Admin and assigned to selected profiles to receive in the list.
- **My Reports**-A list of saved Advanced Reports that have been generated by the user.
- **Published Reports** -A list of saved Advanced Reports that have been created by the user or other users and shared with selected profiles.

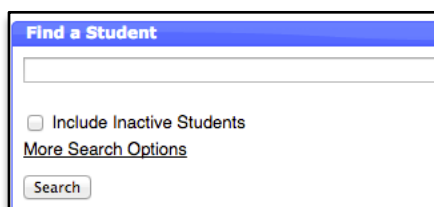
ACTIVITY

1. Which menu contains a report where the user can see a list of discipline referrals? _____
2. Which menu and option contains the scheduling “electronic white board”? _____
3. Which menu contains a report of all students who are missing requests? _____
4. Which menu contains test history information? _____
5. Which menu contains a summary of days that a student has missed? _____

SEARCHING FOR STUDENTS

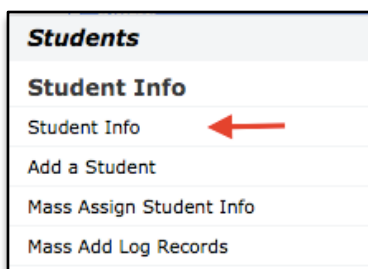
Focus allows for quick and easy searching of student information. Users may be interested in student information such as demographic data, student schedules, absences, or course history. Users have the ability to quickly find this information by using the **Find a Student** box on the main portal page to search for students. In the blank Find a Student text box, users have the option to conveniently search for students by **name, student ID, or Student Groups** as well as options to **Search all Schools** or **Include Inactive Students**. Below is an overview of the basics of searching for students, including additional ways to search for specific students or groups of students.

As described above, the Find a Student box on the main Portal Page is a quick way to search for students.



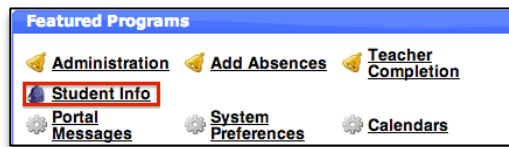
The student search box also includes the option to search by **Student Groups** (if permissions allow). Student Groups can be used to narrow results when searching and viewing student records. For example, groups can be set up and assigned to guidance counselors, discipline deans, and other users who need to view a specific user defined group of students.

Users can also search for students by navigating to the **Students** menu then selecting the Student Info from the pull-down menu tab. This will display the **Student Info** screen.



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Another method used to search for students is via the **Featured Programs** in the Portal blocks:



Click on **Student Info** in order to be taken to the student information screen where student searches can be executed.

Simple List

On the Student Info screen, clicking the **Search** button with a blank search bar will bring up a comprehensive list of students under the **Simple List** tab.

A screenshot of the 'Student Search' interface. It features a search bar labeled 'Student' with a red arrow pointing to it. To the right, there is a 'Student Group' dropdown menu set to 'N/A', and two checkboxes: 'Search All Schools' and 'Include Inactive Students'. At the bottom right, there are 'Search' and 'Reset' buttons. A red arrow points to the 'Search' button.

The **Simple List** is a comprehensive list of every student a user has access to. Students' names are generally displayed last name first. Simple Lists are school specific, and will only display the students attending the school showing in the navigation bar.

A screenshot of the 'Simple List' table. The table has columns for Photo, Student, Student ID, and Grade. The first row shows a student named Barry, Erica with Student ID 6107012075 and Grade 10. The second row shows Bartlett, Cruz with Student ID 6107919604 and Grade 12. The third row shows Bartlett, Paki with Student ID 6100000843 and Grade 12. The fourth row shows Bates, Emery with Student ID 6110016287 and Grade 09. A red box highlights the '1269 Students' heading and the 'Show All' link. A red arrow points to the Excel icon in the top right corner of the table.

- This list has a heading that totals the number of students that resulted from the search.
- The excel icon  allows users to export this list to an Excel spreadsheet.
- The list can also be printed as a PDF by clicking the  **Print** icon in the footer.

Clicking the heading of each column – **Name, Student ID, or Grade** – will reorder the Simple List by that data.

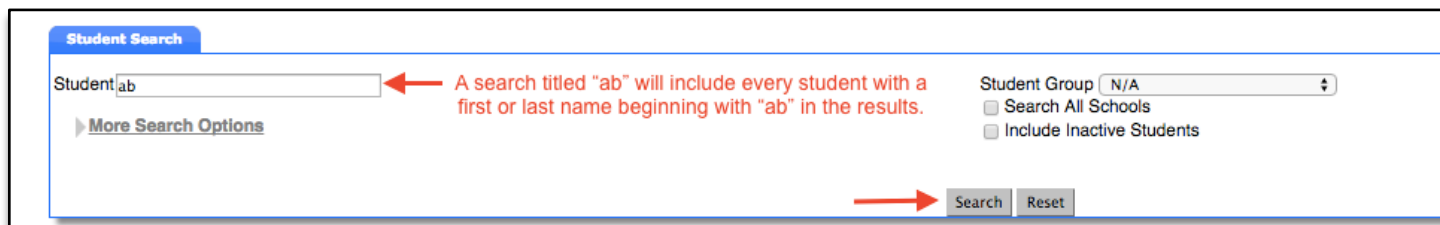
A screenshot of the 'Simple List' table, similar to the one above. Red boxes highlight the 'Student' column header, the 'Student ID' column header, and the 'Grade' column header. Red arrows point to each of these headers. The table data is the same as in the previous screenshot.

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Search Screen

The **Search Screen** is best used when searching for specific students or groups of students. To search for a specific student, navigate to the **Search Screen**. In the blank text box, enter a full or partial name (using either first or last names) in the search bar. Then click **Search** (searches are not case sensitive). In addition to full or partial name searches, commas can be used as well. “**ab,**” would show students with a **last name** beginning with **ab**. “**,ab**” would show students with a **first name** starting with **ab**.

Student ID Numbers can also be used in the search box. Either enter an entire student ID to search for that student, or use a comma-separated list of student IDs to return a list of students.

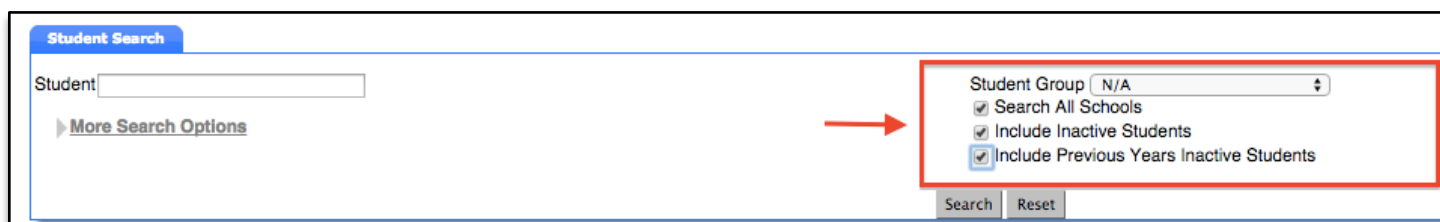


The screenshot shows the 'Student Search' interface. On the left, there is a text input field labeled 'Student' containing the text 'ab'. A red arrow points from a text box to this input field. The text box contains the text: 'A search titled "ab" will include every student with a first or last name beginning with "ab" in the results.' To the right of the input field is a link that says 'More Search Options'. Further right is a 'Student Group' dropdown menu set to 'N/A'. Below this are two checkboxes: 'Search All Schools' and 'Include Inactive Students'. At the bottom right are 'Search' and 'Reset' buttons. A red arrow points from the text box to the 'Search' button.

Note: lists of student numbers can also be copied and pasted from Excel into the search box to produce a list of students.

The **Search Screen** allows users to:

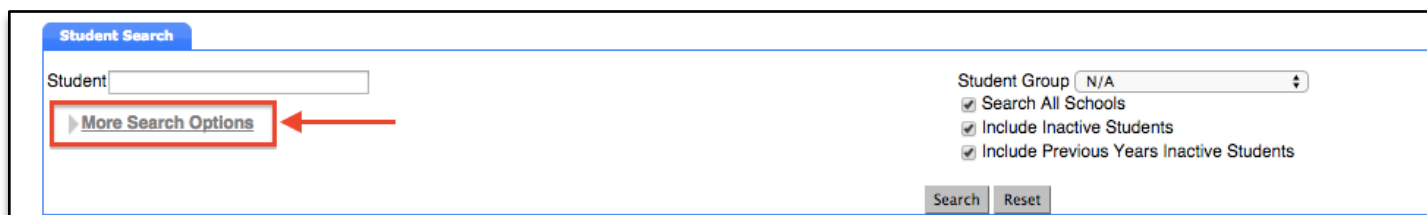
- Search by **Student Group**: search within a predefined group. (8.0+ versions).
- **Search All Schools**: search all schools (Only available if the user has rights to more than one school).
- **Include Inactive Students**: view students who have withdrawn during the current school year.
- **Include Previous Years Inactive Students** (appears once Include Inactive Students has been selected): view students who have been active in the school or district at any time (as long as that previous data is loaded into Focus).



This screenshot shows the 'Student Search' interface with the search options expanded. A red box highlights the 'Student Group' dropdown (set to 'N/A') and the three checked checkboxes: 'Search All Schools', 'Include Inactive Students', and 'Include Previous Years Inactive Students'. A red arrow points from the text box in the previous screenshot to this red box. The 'Search' and 'Reset' buttons are visible at the bottom right.

More Search Options

The Search Screen also provides a link to allow users to input **More Search Options**, which allows the user to search for students who meet a specific set of criteria. This feature pulls every student data field that a user has permissions to view and/or edit into search parameters.



This screenshot shows the 'Student Search' interface. A red box highlights the 'More Search Options' link, which is preceded by a right-pointing arrow. A red arrow points from the text box in the previous screenshot to this red box. The search options on the right are visible but not highlighted.

By clicking on the More Search Options link, a list of every data field (that the user has access to) in SIS will display. Click on any of the links to open fields within that feature. For example, the General link allows the user to choose general

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information about the student(s) such as gender, race, birth date, etc. Users can set as many parameters as necessary, which will yield more specific search results.

ACTIVITY

1. Why would one user have *Search All Schools* when another user would not? _____
2. What additional option appears if the user selects Include Inactive Students? _____
3. What options do users have to search for students? _____
4. From the *Students Menu* select Student Info and then search for a student. What student screen opens when a student is selected? _____
5. From the *Scheduling Menu* select Student Schedule and then search for a student. Where does the search screen open to when a student is selected? _____

STUDENT SUB-MENUS

Student Sub-menus are quick links to the student's record. Users can view the student's general information and other student data such as enrollment records, schedule, grades, absences, referrals, and test scores through the sub-menus.

Demographics

The Demographics Sub-Menu displays the various screens used by different users in the district. Certain screens are available and student data can be edited within the tabs depending on users' profile permissions.

- On the left side of the student's demographic screen, the Search box can be used to search for a specific screen.
- **Click the grey arrow to close the list of screens and expand the student information section of the screen.**

Note: clicking on the grey arrow again will reopen the list of screens.

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On the right side of the student demographic screen, users have the ability to:

1. Type in a new student's name to search upon (or use the drop down to select a name from the list)
2. Navigate through previously searched student list.
3. Edit (if permissions allow) any of the student's data that has the pencil icon on the field name.

Note: if student data is edited, a red Save button will appear. Click to preserve changes to data.

Enrollment

The Enrollment Sub-menu displays the student's enrollment records. The chart layout (default view) allows users to scroll horizontally. Click on the View button to see/edit Rolling/Retention option, Graduation Requirement Program, and Progression Plan (if being used).

	Year	School	Grade Level	Enrollment Date	Enrollment Code	Drop Date	Drop Code	Prior District	Prior State	Prior Country	Ed
	2015-2...	Lake Trafford Ele...		01/20/2016				11 - Collier	FL - Florida	US - United S...	Z -
View	2016-2...	Lake Trafford Ele...	04	08/10/2016				11 - Collier	FL - Florida	US - United S...	Z -
View	2015-2...	Lake Trafford Ele...	03	08/17/2015				11 - Collier	FL - Florida	US - United S...	Z -
View	2014-2...	Lake Trafford Ele...	02	08/18/2014	(E01) In District P...	06/04/2015	(W02) In ...	11 - Collier	FL - Florida	US - United S...	Z -
View	2014-2...	Pinecrest Elemen...	02	06/15/2015	(R02) From Othe...	07/24/2015		Not Applicable			

Depending on user permissions:

- **View** allows users to view/edit enrollment records vertically, as well as tab through fields for faster data entry.
- **View** may not be visible on all enrollment rows.
- Clicking **Return to Enrollment** returns users to the horizontal chart view.

greyed out fields cannot be edited

NOTE: fields that are greyed out cannot be edited despite having the pencil icon on the field name.

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Schedule

The **Schedule** Sub-menu displays the student's current schedule. Before the school year begins, delete boxes will be available to drop classes and classes can be rearranged into different periods by selecting from drop-downs. After the term has begun, classes can only be dropped using the Dropped field. Editing a student schedule will be covered in detail in a later scheduling training.

11 Classes 								Mass Update 
Course	Period - Teacher	Meeting Days	Room	Term	Enrolled	Dropped	Last Modified	
LANG ARTS GRADE 3	01 07 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
THIRD GRADE	01 01 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
ATTENDANCE	01 01 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
SCIENCE GRADE THREE	08 08 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
MATH GRADE THREE	10 11 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
PHYSICAL EDUCATION 3	12 12 - 315 - Steve M Grimes	MTWHF	9-001	Full Year	Aug 17, 2015	-		
MUSIC - INTERM 1	13 13 - TH - 315 - Lauren Ann Forbis	TH	A-59	Full Year	Aug 17, 2015	-		
ART - INTERM 1	13 13 - MW - 315 - Cheryl M Kieser	MW	A-39	Full Year	Aug 17, 2015	-		
INTROD TO CPTRS	13 13 - F - 315 - Donna Marie McAvoy	F	F-12	Full Year	Aug 17, 2015	-		
SOC STUDIES 3	14 14 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
HEALTH - GRADE 3	14 14 - 315 - Tara Panella	MTWHF	C-08	Full Year	Aug 17, 2015	-		
+ Add a Section								

Requests

Requests are typically used for Secondary Schools. The Requests Sub-menu allows a user to view, enter and modify a student's course requests.

0 Requests And 0 Alternates

Approved by Counselor: ☐
Locked for Students: ☐

Export: 
Filters: OFF

☐	Course	Course #	Elective Priority	Term	With Teacher	Without Teacher	With Period	Without Period	Last Modified By
☐									

Save

Add a Request: Quick List

2 Requirements

Subject
Course / Elective Priority

Electives

Language Arts

Grades

Grade information can be viewed by marking periods, semesters, year, or full academic history. The calendar that the school is currently in determines which quarter will initially be displayed.

Course History														
Quarter 4 Quarter 4 Exams Semester 2 Semester 2 Exams Full 2013 Year Full 2013 Year Exams Progress Period 4 All Quarters All Quarter Exams All Semesters All Semester Exams All Years All Year Exams All Progress Periods														
Cumulative GPA: 2.5000 Class Rank: 10.00 Total Credits: 10.00														
106 Grades														
Export:  Filters: OFF														
Year	Marking Period	Course	Percent	Grade	Grade Scale	Cred. Attempted	Cred. Earned	GPA PTS	Weighted GPA	Affects GPA	Teacher	School	Grad Subject	Comments
2013-2014	Quarter 4				APIB/DC	1				☒				
2012-2013	Quarter 4	ENG 1 PRE-AP 10013209	68.00	D		1.00	1.00	1.00	1.00	☒	Heslam, Bethany		English	
2012-2013	Semester 2	ALG 1 12003102	81.00	B		1.00	1.00	3.00	3.00	☒	Heslam, Bethany		Math	
2012-2013	Semester 2	BAND 1 13023002	84.00	B		1.00	1.00	3.00	3.00	☒	Heslam, Bethany		Performing Fin...	

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Gradebook

The Gradebook Sub-menu allows the user to view a student's overall grade for their scheduled courses as well as the individual assignment grades (click on the Course Name or use the "Please Select a Course" pull down).

Please Select a Course ☐ Include Inactive Courses ☐ Include Courses from Other Schools					
10 Courses					
Search					
Course	Period	Marking Period	School	Teacher	Grade
LANG ARTS GRADE 3	01 07 - 315 - Tara Panella	Full Year	Lake Trafford Elementary	Tara Panella	Not Graded
THIRD GRADE	01 01 - 315 - Tara Panella	Full Year	Lake Trafford Elementary	Tara Panella	Not Graded
SCIENCE GRADE THREE	08 08 - 315 - Tara Panella	Full Year	Lake Trafford Elementary	Tara Panella	Not Graded
MATH GRADE THREE	10 11 - 315 - Tara Panella	Full Year	Lake Trafford Elementary	Tara Panella	Not Graded
PHYSICAL EDUCATION 3	12 12 - 315 - Steve M Grimes	Full Year	Lake Trafford Elementary	Steve M Grimes	Not Graded
MUSIC - INTERM 1	13 13 - TH - 315 - Lauren Ann Forbis	Full Year	Lake Trafford Elementary	Lauren Ann Forbis	Not Graded
ART - INTERM 1	13 13 - MW - 315 - Cheryl M Kieser	Full Year	Lake Trafford Elementary	Cheryl M Kieser	Not Graded

Absences

The Absences Sub-menu displays an Absence Summary of the student's attendance. Users can view the data in a specified timeframe. Absences can also be added from this screen if the user has edit permission.

Report Timeframe: August 17 2015 - June 7 2016 Go	
Absent: 0 periods (during 0 days)	Other Marks: 0 periods (during 0 days)
Absent: 0 periods	Unexcused/Unvalidated: 0 periods
Excused: 0 periods	Tardy (Unexcused): 0 periods
OSS: 0 periods	Left School Before End of Day: 0 periods
Observance of Religious Belief: 0 periods	Tardy (Excused): 0 periods
Detention Center: 0 periods	ISS: 0 periods
Truant: 0 periods	Clinic: 0 periods
Skipping/Cut: 0 periods	Field Trip/SRA: 0 periods
	Hospital/Homebound: 0 periods
	10+ Tardy: 0 periods
	Office: 0 periods
Total Full Days Possible: 82	
Total Full Days Attended: 82 (100%)	
Total Full Days Absent: 0 (0%)	
Enrollment Dates: Aug 17, 2015 - ...	
Note	

Referrals

The Referrals Sub-menu allows users to view a list of referrals the student has received. A user can also opt to view referrals from other schools the student has attended, as well as previous year referrals on the student. By clicking on the referral from the list, it will open the referral form to view.

Referrals will continue to be entered into Student Pass and imported into Focus.

Search Screen Simple List ☐ Show Referrals from all schools ☐ All years											
697 Referrals Found Customize Columns											
< Prev Page: 1 / 35 Next > Export: Filters: OFF											
Student	Student ID	Grade	Reporter	Entry Date	Processed	Incidents	Time Incident	Location	Staff Statement	Incident ID	Behavior was directed primarily towards
Abbott, Jasmine	6101002191		Acevedo, James	08/25/2013	☒	Smoking (...)	8:00 - 9:00	Rest room	Jasmine was caught		Neither or not applicable
Abbott, Jasmine	6101002191		Acosta, Alec	04/29/2014	☒	Threats (B)	8:00 - 9:00			10002564	
Abbott, Jasmine	6101002191	09	Albert, Ro...	08/11/2015	☐	Lack of co...	8:00 - 9:00	Hallway	Statement	10002580	Adults
Acevedo, James	6107913713		Bennett, M...	03/25/2012	☒	Inappropri...	Lunch	Lunch room	James was yelling c		Other students

Pre-Scheduling 1

Test History

The Test History Sub-menu displays a list of all imported tests the student has taken. It also displays the administration date, the school year, and grade level for each test. Detailed test data and scores will display by clicking on the grey triangle next to the test name.

11 Test Administrations													Filter	11
Test	Administration Date	School Year	Gradelevel	Form	LEP Info	DJJ Info	Test Level	Include in Transcript	District Administered	School Administered	Test Publication Year			
Stanford Achievement Test (STA)	03/25/2005	2004-2005	KG	-	-	-	-	No	61	-	-			
2 Test Parts														
Title	Lexile Score (LX)	Normal Curve Equivalent (NC)	Pass/Fail (PF)	Raw Score (RS)	National Percentile (NP)	Scale Score (Expanded Standard Score) (SS)	Not Applicable (ZZ)	Developmental Score (DS)	Achievement Level (AL)	Points Possible (PP)	Local Stanline (LS)	Table Test Level (TTL)		
COMPREHE	-	-	-	9	-	422	-	-	-	-	-	0000		
MATH(T)	-	-	-	12	-	429	-	-	-	-	-	0000		
N/A												N/A		
Stanford Achievement Test (STA)	03/23/2006	2005-2006	KG	-	-	-	-	-	No	61	-	-		
Stanford Achievement Test (STA)	02/28/2008	2007-2008	02	-	-	-	-	-	No	61	-	-		
Florida Comprehensive Assessment Test (FCA)	02/27/2009	2008-2009	03	-	-	-	-	-	No	61	-	-		
Florida Comprehensive Assessment Test (FCA)	02/26/2010	2009-2010	04	-	-	-	-	-	No	61	-	-		

ACTIVITY

- Which gray sub menu contains the student's recorded test scores? _____
- Which gray sub menu contains the student's recorded absences or tardies? _____
- How do users know which student fields can be edited? _____
- Which gray sub menu contains a further set of tabs of student data? _____
- List two pieces of information found on the Demographic tab.
_____, _____
- What is the benefit of updating enrollment information from the "view" layout rather than the chart layout? _____



Focus University Training Document

PRE-SCHEDULING 2-“More Search” Options & Advanced Reports

2016

Training Agenda:

- **“More Search” Options**
 - Menu Options
 - Demographic Tab Options
 - State Reporting Options
- **Advanced Reports**
 - Navigation and Access
 - Search Criteria
 - More Search Options
 - Available Fields
 - Fields to Include in Report
 - **Modifying the Report**
 - **Filtering the Report**
 - **Saving the Report**
 - Modifying Saved Report
 - Filtering Saved Report
 - **Exporting and Printing Advanced Reports**

Purpose:

To effectively schedule students, users must be able to search for students by name or ID, as well as search for a subset of students. This search may relate to schedules, requests, demographic data, test history or course history. In addition to searching, the user can take advantage of the power of the **Advanced Reports** to compile, view, and track specific student data. Users can filter data in Advanced Reports, correct and save data from within Advanced Reports, and export the report into Excel or a PDF file for printing. The parameters and search criteria set in an Advanced Report can also be saved for future use, and can be easily accessed from **Reports** on the main menu.

Objectives:

- ✓ Review Simple Searches
- ✓ Understand the available More Search options
- ✓ Be able to search for student data from Scheduling, Assessment and other menus
- ✓ Navigate to and access Advanced Reports (new and saved)
- ✓ Set the Advanced Report Criteria
- ✓ Modify Search Criteria and report data
- ✓ Save, Create, Publish, and Print Advanced Report

Training Site URL:

train.focus.collierschools.com

Survey Monkey Link

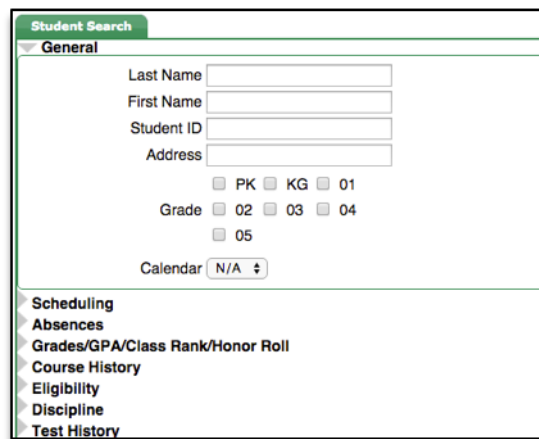
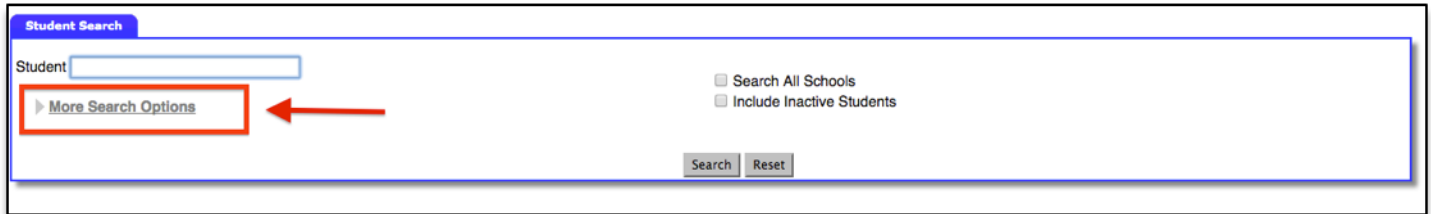
www.surveymonkey.com/r/LTYC3PM

Pre-Scheduling 2

More Search Options

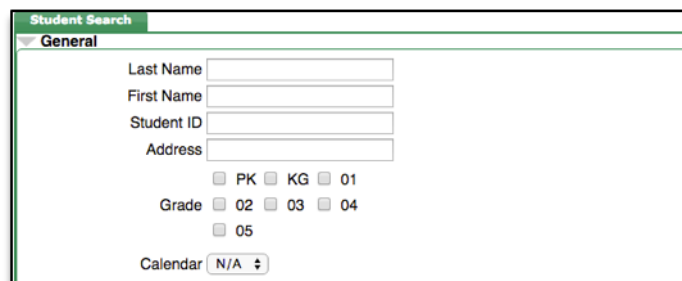
The **More Search Options** feature allows the user to search for detailed data on students. By clicking on the More Search Options link, a list of every data field in SIS will display.

- Click on any of the links to open fields within that feature. For example, the General link allows the user to choose general information about the student(s) such as gender, race, birth date, etc.
- Users can set as many parameters as necessary, which will yield more specific search results.
- To search on an available field or fields select **Student Info** from the **Students** Menu and then click on **More Search Options**.



In **More Search Options** there are 4 sections available: **General searching**, **Focus Menus**, **Florida Fields** and **Student Fields**. Click on the grey arrow to expand and collapse any of the menu options.

- **General Searching:** The first section is the **General section**. Here the user can search by name, id, address, and calendar or grade level.



- **Focus Menus:** The second section provides searching options based on the **Focus Menus**, as well as enrollment and computed fields.

Pre-Scheduling 2

If the user would like to search on a scheduling option (scheduled into a course, requested grad subject, section or teacher and more), the user can click on **Scheduling** and select the appropriate option.

The Scheduling search form includes the following fields and options:

- Scheduled into Section: Choose
- Scheduled into Course: Choose
- Scheduled into Course(s): [Dropdown]
- Not Scheduled into Course(s): [Dropdown]
- Scheduled into Course(s) Last Year: [Dropdown]
- Not Scheduled into Course(s) Last Year: [Dropdown]
- Scheduled into Teacher: Choose
- Requested Course: Choose
- Requested Course(s): [Dropdown]
- Not Requested Course(s): [Dropdown]
- Requested Grad Subject(s): [Dropdown] (with a sub-menu icon)
- Scheduled into at least 1 active Course: ☐
- Scheduled with an Out of Field Teacher: ☐

- For example, searching by **Not Scheduled into Course(s)**: this option would allow users to search for students who have not been scheduled into “homeroom” when adding students to packages:

Not Scheduled into Course(s) FIRST GRADE (5100070)

Opening the **Grades/GPA/Class Rank/Honor Roll** allows users to search by earned grades per term, including students earning Honor Roll.

The Grades/GPA/Class Rank/Honor Roll search form includes the following sections and options:

- Average Percent Grade**
 - ☒ FY ☐ S2 ☐ Q3
 - Between [] & []
- Letter Grade**
 - ☐ Did not receive
 - ☐ CH ☐ FY ☐ FY Exam
 - ☐ S2 ☐ S2 Exam ☐ Q3
 - ☐ Q3 (Gradebook)
 - ☐ 4 ☐ 3 ☐ 2 ☐ 1 ☐ 2E ☐ 1E ☐ 4M ☐ 3M ☐ 2M
 - ☐ 1M ☐ NE
- Honor Roll**
 - ☒ FY ☐ S2 ☐ Q3
 - ☐ Honor Roll Students

Opening the **Discipline** option will allow the user to search by certain fields on the referral form, by students with X number of referrals, by reporter, etc.

The Discipline search form includes the following fields and options:

- Number of Referrals received: Between [] & []
- Processed by Administrator: [Dropdown] (N/A)
- Reporter: [Dropdown] (N/A)
- Incident Date: Between [] & []
- Discipline Code: [Dropdown] (N/A)
- Action Record(s): [Dropdown] (N/A)
- School-Related Arrests: [Dropdown] (N/A)
- Context: [Dropdown] (N/A)
- Incident ID: Between [] & []
- Involved in Bullying: [Dropdown] (N/A)
- Involved in Hate Crime: [Dropdown] (N/A)
- School Where Referral Took Place: [Dropdown] (N/A)
- Use of Drugs: [Dropdown] (N/A)
- Location: [Dropdown] (N/A)

Pre-Scheduling 2

Opening the **Test History** option will allow the user to search by test name, score type, score range and administration date.

The screenshot shows a search form titled "Test History". It includes the following fields and options:

- Test**: A dropdown menu with "N/A" selected.
- Part**: A dropdown menu with "N/A" selected.
- Score Type**: A dropdown menu with "N/A" selected.
- Score Between**: Two input fields separated by an ampersand (&).
- Score Type**: A dropdown menu with "No Filters" selected.
- Administration Date**: A date range selector with "Timeframe:" and two calendar icons.
- Test School Year**: A dropdown menu with "N/A" selected.
- Test Gradelevel**: A dropdown menu with "N/A" selected.
- Test LEP Info**: A dropdown menu with "N/A" selected.

Florida Fields: The third section users can access for searching criteria is the **Florida (state reporting) Fields** section. State reporting fields from the master schedule, student schedule, and course catalog are available. This section provides the user with the state custom fields.

A vertical navigation menu titled "Florida Fields" with three options: "Master/Student Schedule", "Course Catalog", and "Course Catalog". The "Master/Student Schedule" option is highlighted with a blue arrow.

The screenshot shows a search form titled "Florida Fields - Master/Student Schedule". It includes the following fields and options:

- Exclude from FTE**: A checkbox.
- FEFP Number**: A text input field.
- ELL Instructional Model**: A dropdown menu with "N/A" selected.
- Class Minutes Weekly**: A text input field.
- Year-Round/Extended School Year FTE**: A dropdown menu with "N/A" selected.
- Dual Enrollment Indicator**: A dropdown menu with "N/A" selected.
- Reading Intervention Component**: A dropdown menu with "N/A" selected.
- PMRN**: A checkbox.
- Course Flag 1**: A dropdown menu with "N/A" selected.
- Course Flag 2**: A dropdown menu with "N/A" selected.
- Course Flag 3**: A dropdown menu with "N/A" selected.
- Course Flag 4**: A dropdown menu with "N/A" selected.
- Funding End Date**: A text input field.
- Industry Certification ID**: A dropdown menu with "N/A" selected.
- Industry Certif Outcome**: A dropdown menu with "N/A" selected.
- Industry Certif Date**: A text input field.
- 2nd Industry Certification ID**: A dropdown menu with "N/A" selected.

Student Fields: The **Student Fields** section allows the user to search on fields located on the student demographic tab. Below is a sample set of demographic tabs available based on the user's profile.

A vertical navigation menu titled "Student Fields" with the following options: "Demographic", "ELL", "ELL History", "ESE", "Program Summary", "Social Workers", "Special Ed", "Health Screening", "Health Summary", "Immunizations", and "Medical". The "Demographic" option is highlighted with a blue arrow.

- Clicking on any tab will open it so the user can select available fields for search criteria.

Pre-Scheduling 2

ELL

Primary Home Lang

First Monitor Status

Second Monitor Status

Third Monitor Status

Fourth Monitor Status

Student Native Language

English Language Learner

ESE

McKay Program

Early Intervention

PPPS

Time, Total Student Week Between &

Time, With Non-Disabled Between &

Special Diploma

Extended School Year Services

504 Eligible

ESE FEFP Code

- Users also have the ability to select more than one criterion within a pull down. **This creates an “or” logic where the system will pull in students meeting any one of the selected criteria.**

LEP Student LEP in LEP classes [LY], Tested - n...

Filter

Check all visible Clear selected

☐ N/A

☐ No Value

☐ Two year Followup [LF]

☐ K-12 tested or pending [LP]

☒ LEP in LEP classes [LY]

☐ LEP in LEP classes [LD]

☐ Exited after two year followup Also applies to John M. McKay Scholarship students [LZ]

☐ To be Tested [TT]

☒ Tested - not eligible [TZ]

☐ Not applicable [ZZ]

Scenario Directions: Below are examples of instances when the More Search Options feature may be used. Read the scenario, and then use More Search Options to search for the information. Try finding the information before looking at the answers below the scenario!

504 Students

Scenario

It's the beginning of the school year, and we want to ensure that the accommodations for all our current 504 students are in place. We also want to review the currently active 504 records to confirm that none of these students were dismissed at the end of the last school year. We want to run a search to identify all of the currently active 504 students according to the data stored in the Student Information System.

1. From the **Students** menu, select **Student Info** from the pull-down menu. This displays the Student Info screen.

Students

Student Info

Student Info

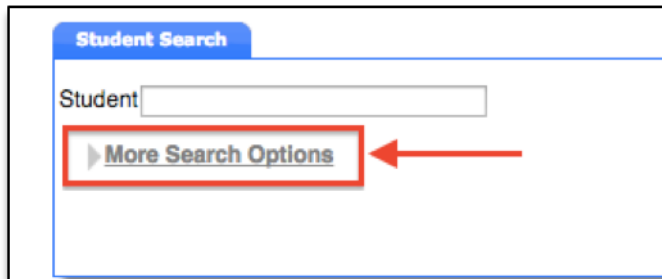
Add a Student

Mass Assign Student Info

Mass Add Log Records

Pre-Scheduling 2

2. On the **Student Info** screen, click the **More Search Options** button.

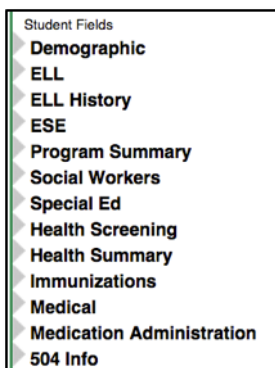


Student Search

Student

More Search Options

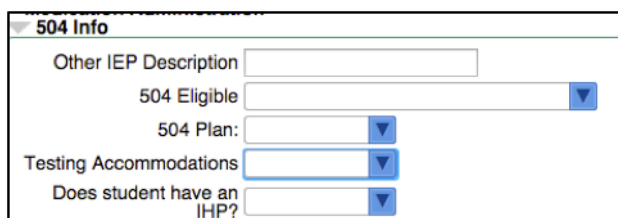
3. Click on the listed option for 504 information, titled "504 Info".



Student Fields

- Demographic
- ELL
- ELL History
- ESE
- Program Summary
- Social Workers
- Special Ed
- Health Screening
- Health Summary
- Immunizations
- Medical
- Medication Administration
- 504 Info**

4. Locate the "504 Eligible" field, select the "yes" option, and click "Search" at the bottom of the screen to see a list of students with this demographic.



504 Info

Other IEP Description

504 Eligible

504 Plan:

Testing Accommodations

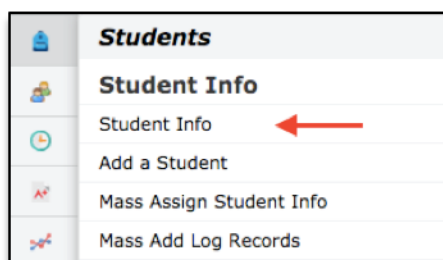
Does student have an IHP?

Scenario

It's the beginning of the school year, and we want to know of any special education students who are on a plan that qualifies them to be a "254." We want to run a search to identify all of the students who are currently coded with an ESE FEFP code of 254, according to the data stored in the Student Information System.

Special Ed Students

1. From the **Students** menu, select **Student Info** from pull-down menu. This displays the Student Info screen.

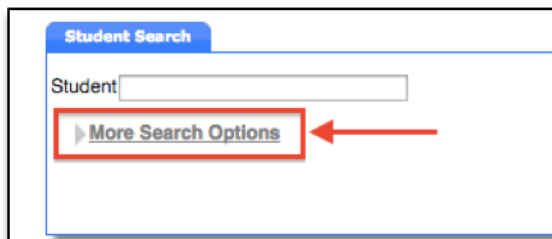


Students

- Student Info**
- Add a Student
- Mass Assign Student Info
- Mass Add Log Records

Pre-Scheduling 2

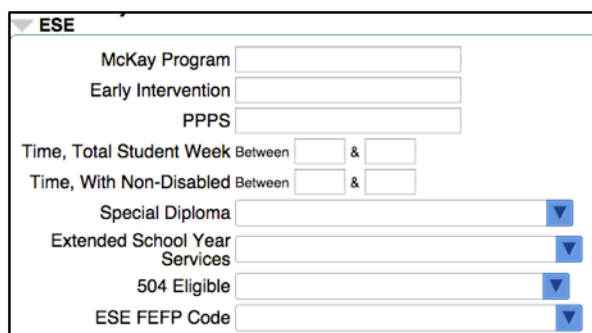
2. On the **Student Info** screen, click the **More Search Options** button.



3. Click on the listed option for Special Education Information, titled "ESE".



4. Locate the ESE FEFP field, select 254 option from the drop-down menu, and click "Search" at the bottom of the screen to see a list of students within this demographic.

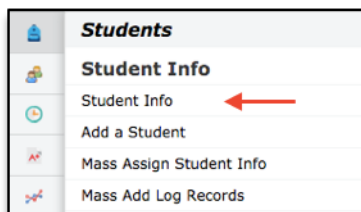


ELL Students

Scenario

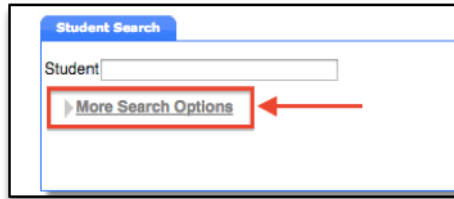
It's the beginning of the school year, and we want to ensure that all of the active LEP students are scheduled with certified LEP teachers. We want to search for all "LY" students and look at their schedules. We want to run a search to identify all of the active ELL students, according to the data stored in the Student Information System.

1. From the **Students** menu, select **Student Info** from the pull-down menu. This displays the Student Info screen.

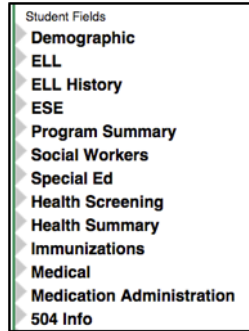


Pre-Scheduling 2

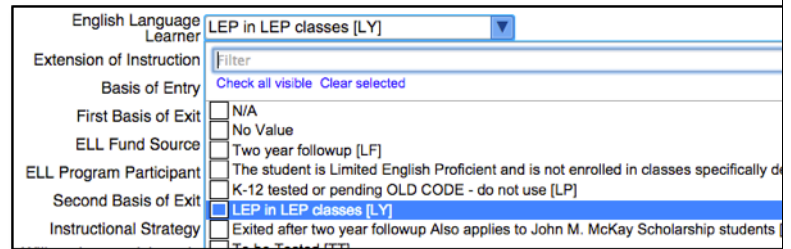
2. On the **Student Info** screen, click the **More Search Options** button.



3. Click on the listed option for ELL information, titled “ELL”.



4. Locate the “English Language Learner” field, select the “LEP in LEP classes [LY]” option, and click the “Search” at the bottom of the screen to see a list of students within this demographic.

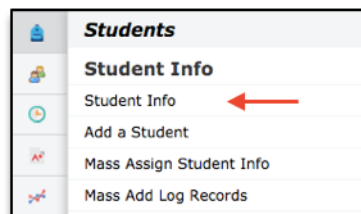


Students Scheduled into a Particular Course

Scenario

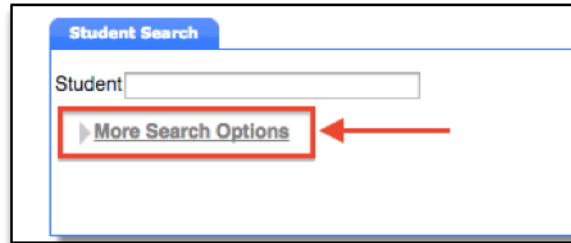
Students who are currently scheduled into a grade level class will be looping with their current teacher for next school year. We want to print a list of these students to have them available for a scheduling team building the master schedule for next school year. We want to run a search to identify all of the students who are currently scheduled with Teacher “X” according to the data in the Student Information System.

1. From the **Students** menu, select **Student Info** from the pull-down menu. This displays the Student Info screen.



Pre-Scheduling 2

2. On the **Student Info** screen, click the **More Search Options** button.

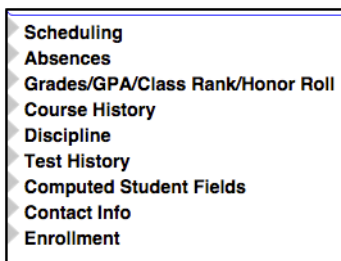


Student Search

Student

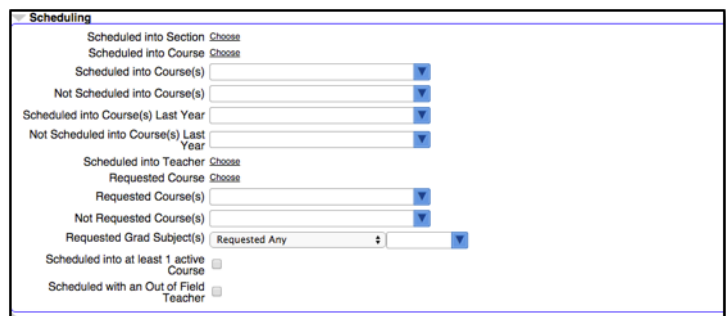
More Search Options

3. Click on the **Scheduling** option.



- Scheduling**
- Absences
- Grades/GPA/Class Rank/Honor Roll
- Course History
- Discipline
- Test History
- Computed Student Fields
- Contact Info
- Enrollment

4. Click on “**Scheduled into Teacher.**”



Scheduling

Scheduled into Section

Scheduled into Course

Scheduled into Course(s)

Not Scheduled into Course(s)

Scheduled into Course(s) Last Year

Not Scheduled into Course(s) Last Year

Scheduled into Teacher

Requested Course

Requested Course(s)

Not Requested Course(s)

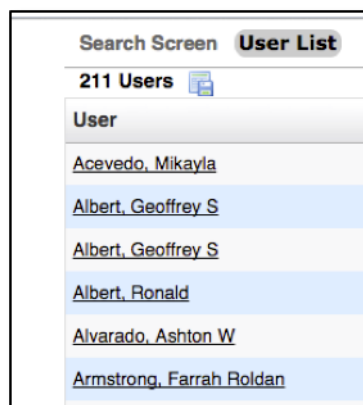
Requested Grad Subject(s) Requested Any

Scheduled into at least 1 active Course ☐

Scheduled with an Out of Field Teacher ☐

5. A list of all teachers in the school will display in a popup. Select the teacher from the list.

Click “Search” to see the resulting list of students.



Search Screen **User List**

211 Users

User

Acevedo, Mikayla

Albert, Geoffrey S

Albert, Geoffrey S

Albert, Ronald

Alvarado, Ashton W

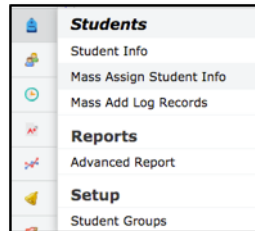
Armstrong, Farrah Roldan

Pre-Scheduling 2

The **Student Groups** screen allows student groups to be created and used for searching and viewing student records. School counselors, discipline deans, and other users who need to view a specific group of students can set up groups.

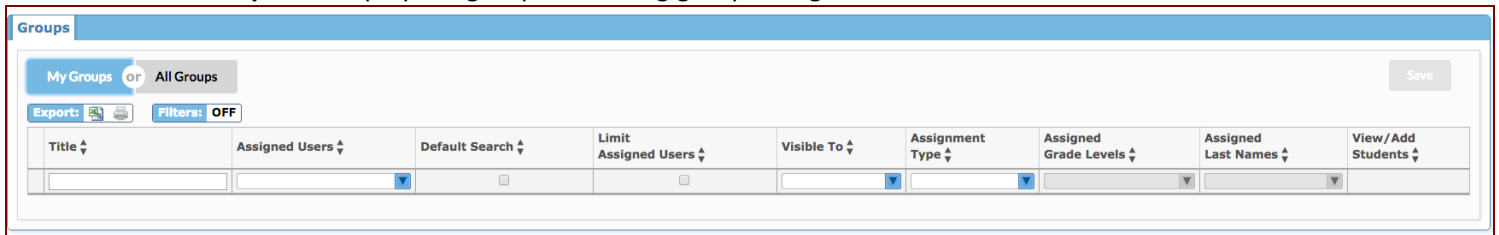
Student groups can be created based on grade level and/or last name, or can be completely customized.

- Click on the **Students** tab. **Student Groups** is located under the **Setup** section.

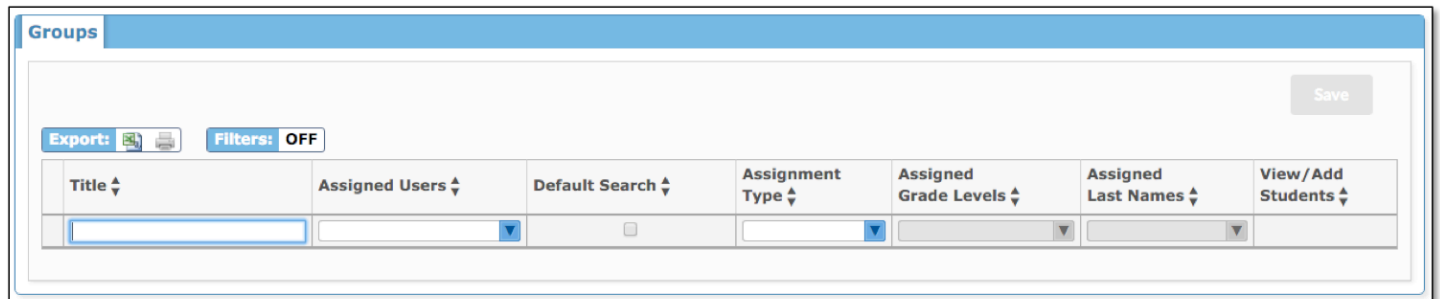


There are two tabs on the Student Groups screen: **My Groups** and **All Groups**.

- The **My Groups** tab displays groups that are assigned to the user.
- The **All Groups** tab displays all groups, including groups assigned to other users.

A screenshot of the 'Groups' screen. At the top, there's a 'Groups' header. Below it, two tabs are visible: 'My Groups' (selected) and 'All Groups'. To the right of the tabs is a 'Save' button. Below the tabs, there's an 'Export' button with a download icon and a 'Filters: OFF' button. Below these are several input fields with dropdown arrows: 'Title', 'Assigned Users', 'Default Search', 'Limit Assigned Users', 'Visible To', 'Assignment Type', 'Assigned Grade Levels', 'Assigned Last Names', and 'View/Add Students'. Each field has a small dropdown arrow on its right side.

If users only have permissions to create their own groups, then only the Groups tab will display. This tab contains the groups created by the user and groups assigned to the user by others.

A screenshot of the 'Groups' screen. At the top, there's a 'Groups' header. Below it, two tabs are visible: 'My Groups' and 'All Groups' (selected). To the right of the tabs is a 'Save' button. Below the tabs, there's an 'Export' button with a download icon and a 'Filters: OFF' button. Below these are several input fields with dropdown arrows: 'Title', 'Assigned Users', 'Default Search', 'Assignment Type', 'Assigned Grade Levels', 'Assigned Last Names', and 'View/Add Students'. Each field has a small dropdown arrow on its right side.

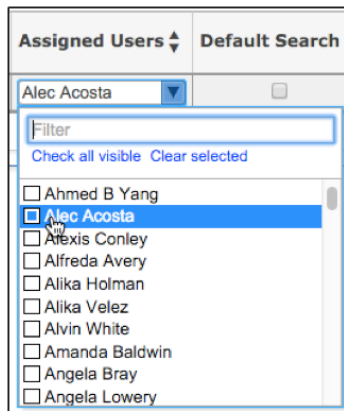
- Begin by entering a **Title** for the group.

A close-up screenshot of the 'Title' input field. The field is labeled 'Title' with a dropdown arrow. Below the label is a text input box.

Assigned Users

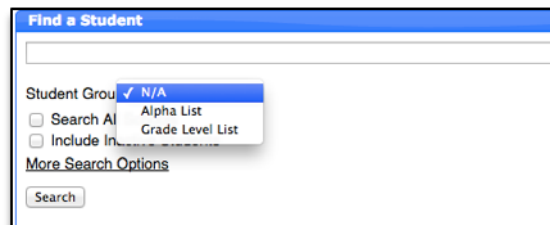
Pre-Scheduling 2

If this group will be assigned to one or multiple specific users, and the user has rights to this functionality, select the users in the **Assigned Users** pull-down. If a user does not have the profile permission “Assign Groups to Other Users,” the group can only be assigned to that user, therefore only their name will display in this pull-down.



Default Search

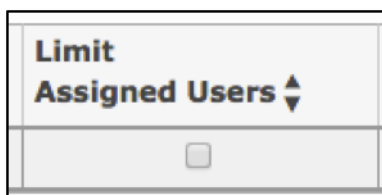
To set this group as the default search group for the assigned users, select the **Default Search** check box. This group will automatically populate the Student Group field on the Search Screen for the assigned users. If the user needs to search outside of the default group, the user will need to select a different group or N/A in the Student Group field and enter different search options.



Note: Default Search also limits the default Focus alerts that a user receives to students in this group. For example, a discipline dean may be assigned a specific group of students to process their referrals. If Default Search is selected on the group, the discipline dean will only receive referral alerts for those students in the default search group.

Limit Assigned Users

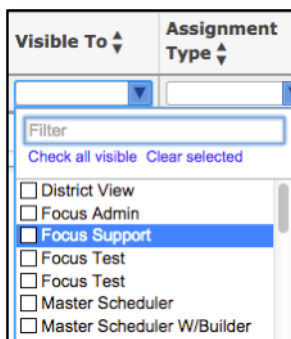
If the assigned users should only be able to view students from this group, select **Limit Assigned Users**. The assigned user(s) will not be able to view student records outside of the assigned group. This feature will only display for the users with the profile permission to “Assign Groups to other Users”.



Visible To

Pre-Scheduling 2

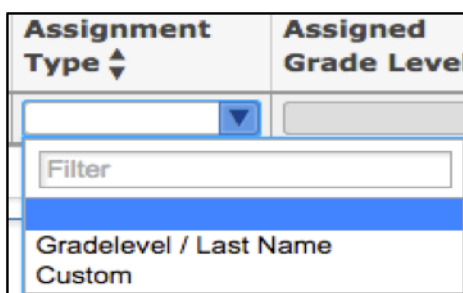
To make this group available to specific User profiles, select the profile(s) from the **Visible To** dropdown. *This field will only display for users with the profile permission to “Assign Groups to Other Users”.*



The screenshot shows a dropdown menu for the 'Visible To' field. The menu is open, displaying a list of user profiles. The 'Focus Support' profile is highlighted in blue. Other profiles listed include District View, Focus Admin, Focus Test, Master Scheduler, and Master Scheduler W/Builder. There are also links for 'Check all visible' and 'Clear selected'.

Assignment Type

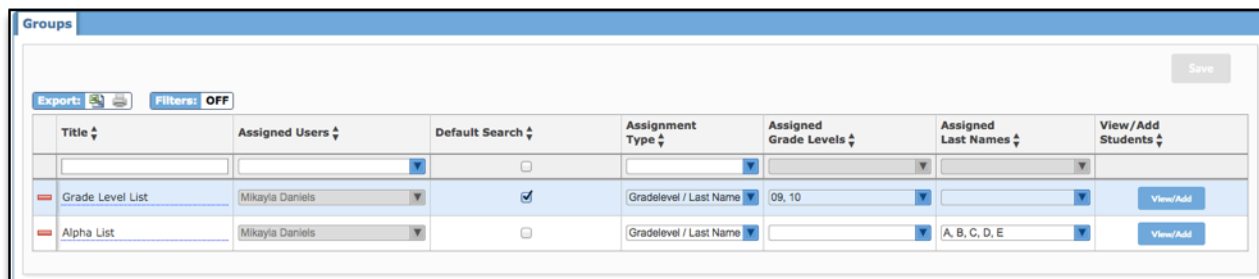
Groups can be created based on **Grade Level /Last Name**, or groups can be **Customized**. Choose the type of group from the **Assignment Type** drop down.



The screenshot shows a dropdown menu for the 'Assignment Type' field. The menu is open, displaying two options: 'Gradelevel / Last Name' and 'Custom'. The 'Gradelevel / Last Name' option is highlighted in blue.

Creating Groups Based on Grade Level and/or Last Name

When Grade Level/Last Name is selected in the **Assignment Type** field, the **Assigned Grade Levels** and **Assigned Last Names** fields become available. Users can either select one or multiple grade levels in the Assigned Grade Levels field, one or multiple letters in the Assigned Last Names field, or select options in both fields to create a group based on grade levels and last names. When finished, press **Enter** to add the group. Then, click **Save** to save changes.



The screenshot shows the 'Groups' management interface. It includes a table with columns: Title, Assigned Users, Default Search, Assignment Type, Assigned Grade Levels, Assigned Last Names, and View/Add Students. Two groups are listed: 'Grade Level List' and 'Alpha List'. The 'Grade Level List' group is selected, and its details are shown in the table. The 'Assigned Grade Levels' field is set to '09, 10' and the 'Assigned Last Names' field is set to 'A, B, C, D, E'. A 'Save' button is visible in the top right corner.

Creating Custom Groups

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If selecting Custom in the **Assignment Type** field, press **Enter** to add the group. Then, click **Save** to save your changes. Click **View/Add** button next to the group to assign students to the group.

The screenshot shows the 'Groups' management interface. At the top, there are tabs for 'My Groups' and 'All Groups', with 'All Groups' selected. A 'Save' button is in the top right. Below the tabs, there are 'Export' and 'Filters: OFF' options. A table lists groups with columns: Title, Assigned Users, Default Search, Limit Assigned Users, Visible To, Assignment Type, Assigned Grade Levels, Assigned Last Names, and View/Add Students. The 'Safety Patrol' group is highlighted in yellow, and its 'View/Add' button is visible.

The View/Add Students tab is displayed for the group. Click **Add Students To Group**.

The screenshot shows the 'View/Add Students' tab for the 'Safety Patrol' group. The title 'Safety Patrol' is at the top. Below it, there is a 'No Records Found' message. On the right side, there are two buttons: 'Add Students To Group' and 'Save'.

On the Search Screen, use **More Search Options** to enter search criteria to locate the desired students and click **Search**.

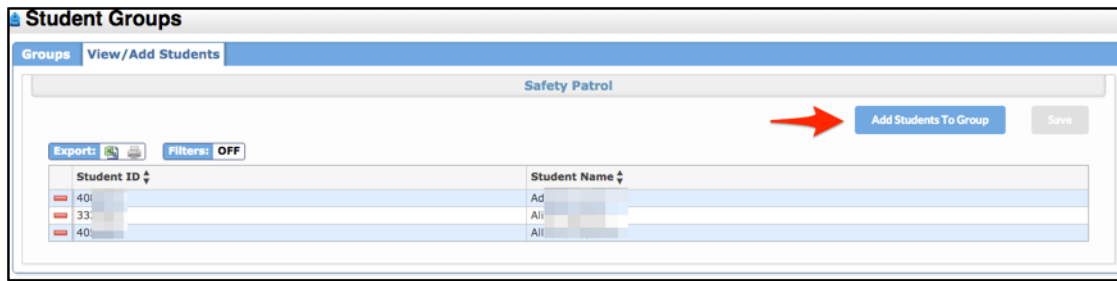
The screenshot shows the 'Student Groups(Safety Patrol) - Add Students' search screen. It has tabs for 'Search Screen', 'Simple List', and 'Customized List', with 'Search Screen' selected. A 'Student Search' section contains a text input field and a 'More Search Options' link. To the right, there are checkboxes for 'Search All Schools' and 'Include Inactive Students'. At the bottom, there are 'Search' and 'Reset' buttons.

In the list of students, select the check box next to each student that will be included in the group. When finished, click **Add Students to Group** at the top-right corner of the screen.

The screenshot shows the 'Student Groups(Safety Patrol) - Add Students' simple list view. It has tabs for 'Search Screen', 'Simple List', and 'Customized List', with 'Simple List' selected. The header shows 'Grade: 05' and '102 Students 3 Selected'. Below the header is a table with columns: Student, Student ID, and Grade. The table contains several rows of student data, with the first three rows having their 'Student' checkboxes selected. At the top right, there is an 'Add Students To Group' button.

The selected students will now display within the **View/Add Students** tab. To conduct another search and add more students to the group, click **Add Students to Group**. The Search Screen will display to search for and select additional students.

Pre-Scheduling 2

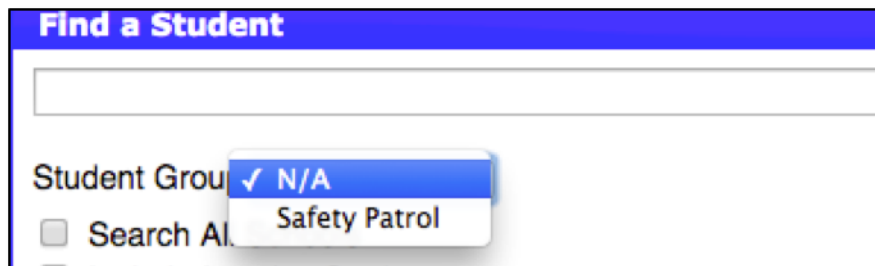


To remove a student from the group, click the red minus sign to the left of the student. In the confirmation pop-up window, click **OK**. Then, click **Save**.

Student ID ↕	Student Name ↕
6101002191	Abbott, Jasmine

Student groups assigned to specific users or visible to a user profile group will be available for selection in the **Student Group** field on any student search screen within Focus.

- If a **Default group** has not been assigned, then N/A will display in the Student Group field. Open the pull-down to select the group to use to search.
- If a **Default group** has been assigned to a user or user profile, the group will automatically display in the Student Group field. If a user has access to more than one student group, use the pull-down to select a group or change to different group.



ACTIVITY

1. Create a New Student Grade level group. Assign the group if your profile has that permission.
2. Create a New Custom Student Group. Select students of your choice to add to the group.

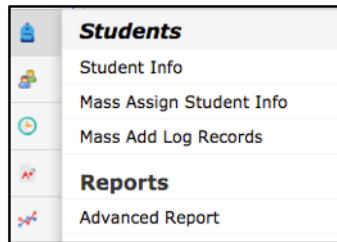
Advanced Reports

Advanced Reports can be used to compile, view, and track specific student data. Users can filter data in Advanced Reports, correct and save data from within Advanced Reports, and export the report into Excel or a PDF file for printing.

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The parameters and search criteria set in an Advanced Report can also be saved for future use, and can be easily accessed from **Reports** on the main menu.

From the Portal page, click the **Students** menu and select **Advanced Reports**.



Note: selecting Advanced Reports from the Users menu will not access student data.

Search Criteria

From the **Advanced Reports** screen, a **Student Search** module will be displayed, along with a **More Search Options** button, **Available Fields** dropdowns, **Fields to Include in Report** box, and options to search all schools and/or inactive students. This screen will dictate the content specifications of the entire report.

A screenshot of the "Student Search" module interface. It features a search bar on the left with a "More Search Options" link. In the center, there's a section titled "Available Fields:" with a search box and a list of fields: Demographic, Address, Primary Contact, Secondary Contact, Third Contact, Fourth Contact, and Section 504. To the right, there's a "Fields to Include in Report:" section with a dashed box. Further right, there's a "Student Group" dropdown set to "N/A", and two checkboxes: "Search All Schools" and "Include Inactive Students". At the bottom right, there are "Run Report" and "Reset" buttons.

More Search Options: (left column)

This will define a specific subset of students to be included in the report; the fields are pulled directly from all Focus data fields related to student information. Clicking on the gray arrow will open the field for search criteria.

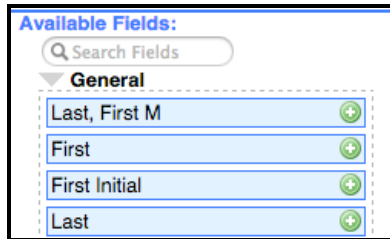
A screenshot of the "More Search Options" dialog box. It has a "General" tab selected. The dialog contains several input fields: "Last Name", "First Name", "Student ID", and "Address". Below these, there are checkboxes for "PK", "KG", "01", "02", "03", "04", and "05". There's also a "Calendar" dropdown set to "N/A". At the bottom, there are expandable sections for "Scheduling", "Absences", "Grades/GPA/Class Rank/Honor Roll", and "Course History".

NOTE: If selecting criteria from **different** fields, the students must meet **ALL** the selected criteria to be pulled into the report. If selecting multiple criteria from within **the same field**, such as using checkboxes, the report will look for **any** student meeting **any** of the selected criteria.

Available Fields: (middle column)

All tabs located in the **Student Info** screen are listed in this (middle) column.

Pre-Scheduling 2

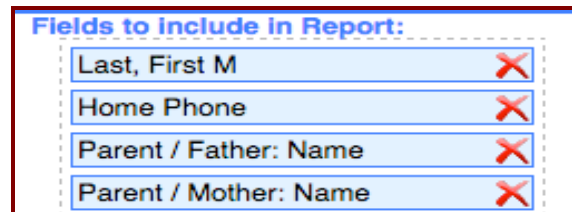


The 'Available Fields' dialog box contains a search bar labeled 'Search Fields'. Below it is a section titled 'General' with a downward arrow. Under 'General', there are four blue boxes with green plus signs on the right: 'Last, First M', 'First', 'First Initial', and 'Last'.

Click and drag the blue boxes into the **Fields to Include in Report** box or click the green + sign. *Clicking alone will not move a blue box to 'Fields to Include in Report'.*

Fields to Include in Report: (right column)

- Add all desired fields from **Available Fields**; the more extensive the included criteria, the more limited the specific report results (unless logging fields are included).
- All fields will be ordered as they appear in the box and can be rearranged as needed by clicking and dragging the field box up or down.
- Delete fields by clicking the red X or by dragging them back to the left.



The 'Fields to Include in Report' dialog box shows four blue boxes with red Xs on the right: 'Last, First M', 'Home Phone', 'Parent / Father: Name', and 'Parent / Mother: Name'.

- Once all report parameters are set to be included, click the **Run Report** button.

Run Report

Note: users also have the option to choose a predefined Student Group to search on

Activity

Run an **Advanced Report** that would be useful for having student ELL Entry & Exit Dates readily available. Include the following fields in the exact order listed below:

- Last, First Name
- Grade
- Student ID
- ELL Entry Date
- ELL Exit Date

Hint: Only pull ELL Students into your report. (Use More Search Options)

Modifying the Report

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Once the report has been run, if the user determines more or less information is required, click the **Modify Report** button to return to the previous screen and modify the parameters of the **Advanced Report**. This action will result in the original search criteria being lost but will retain the **Fields to Include in Report**.



Note: when modifying an unsaved report, the search criteria set in *More Search Options* will need to be reset.

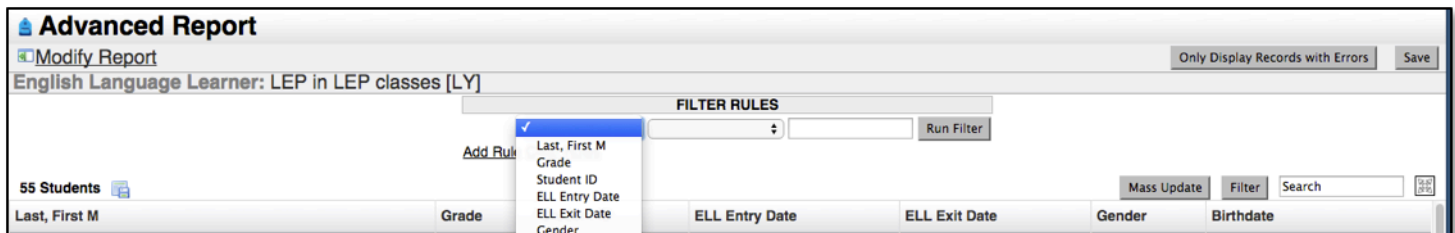
Activity

1. Modify the report created in the above activity.
2. This time add the fields **Birthdate** and **Gender**.
3. Rearrange the fields so that **Gender** and **Birthdate** come after **Student ID**.
4. Run the report.

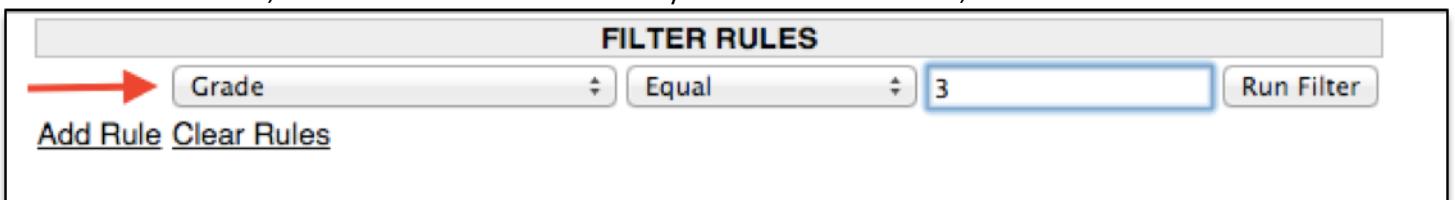
Filtering the Report

Results of an **Advanced Report** can be filtered to display a specific set of data from the results, using the **Filter** button. **Filtering** differs from **More Search Options** in that it narrows the *returned data* to specific information fields rather than narrowing the search criteria used for creating the report.

- Click on the Filter button. Field columns displayed in the report will appear in the first pull-down menu.



- Select the field, then the condition and criteria by which to filter the field, then click **Run Filter**



Additional Filter Rules can be added as needed, using the **Add Rule** button. Determine the logic (And, Or) when using multiple filter rules. The user can add as many filters as logically possible for returned data fields. To filter a field that contains blanks, set the condition to *Greater Than*.

- Click Run Filter after adding any additional rules

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FILTER RULES					
Remove	Grade	↓	Equal	↓	3
Remove	Birthdate	↓	Greater Than	↓	2/2/2007
Remove		↓		↓	
Add Rule Clear Rules					AND ↓ OR ↓ Run Filter

Note: Individual filters can be removed by clicking the Remove link. All filters can be removed by clicking the Clear Rules link. Click Run Filter after removing any rules.

Activity

Directions: Using the previous report created, filter the report in the following manner:

1. Filter the report to only include one grade level.
2. Filter the report to only include girls.
3. Return the report to its original content.

Saving the Report

Save the parameters and search criteria of the **Advanced Report** by clicking the **Create Report** button at the bottom of the report screen. **Note:** Using the Save button at the top right of the screen only maintains the defined parameters of the report and not the data results.



Note: the Create Report button only appears once the report has been run.

The **Saved Reports** screen will appear prompting the user to name the advanced report.

Create new Saved Report

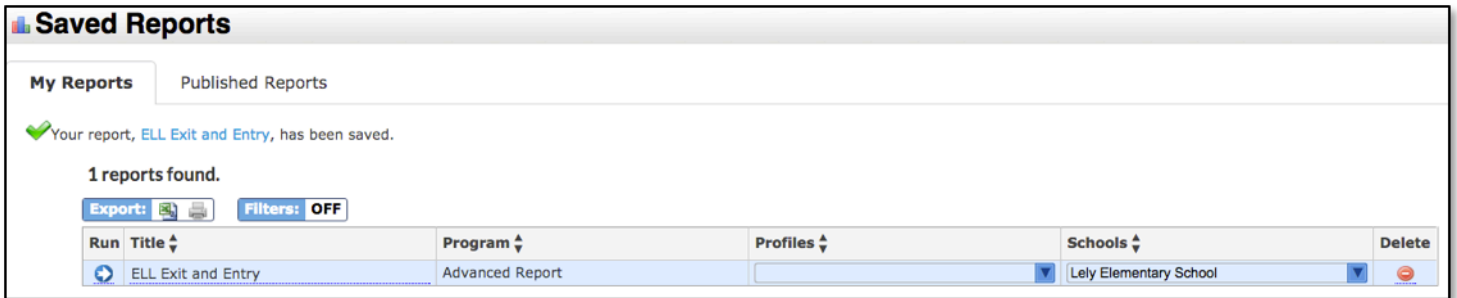
Please enter a name for your new saved report.

This report will be a dynamic report available from the reports menu. All the criteria you entered on the previous screen will be saved so that you can run this report at any time. You will also be able to publish this report to other users once you've saved it.

Report Title

After clicking OK, a confirmation screen will appear on the **Saved Reports** tab with a green checkmark indicating the report has been saved.

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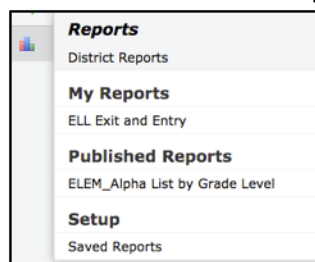


If the user has been granted the rights by the district, the user's saved reports can be published to other user groups to view and/or edit the report.

- Reports created and saved by the user are saved under the **My Reports** tab. The **Published Reports** tab contains reports created by the district and published to specified users.
- The saved list of reports can be exported to Excel or printed using the appropriate icons.
- Users also can turn filters on to drill down on the report list.
- Clicking the blue arrow at the beginning of the line allows the user to run the report directly from this screen.
- The name of the saved report can also be edited by clicking on the blue dotted line under the report's current title.
- Select the **Profiles** drop boxes for the desired user groups. This screen auto saves when the users advances to the next line by clicking into one of the editable boxes and pressing enter.
- Clicking the drop down under **Schools**, the user can choose to publish the report to the current school or all schools (depending on permissions).
- Clicking on the dash at the end of the line will delete the entire report.

Accessing Saved Reports

To access saved reports, navigate to the **Reports** menu and select the report from the pull-down list:



Types Of Reports under this tab are:

- **District Reports** – created by District Administration and shared with select user profiles
Note: If a user does not have permissions to certain student fields included in the report, the fields will appear empty.
- **My Reports** – created by the user
- **Published Reports** – shared with select user profiles by another user
Note: Depending on the user's profile, reports can be shared with school staff or all schools.
- **Saved Reports** – displays a list of reports the user has created; selecting a report from this list will allow the user to edit, delete, and share the report further

Modifying and Filtering a Saved Report

If a **Saved Report** is **Modified** or **Filter Rules** are added later, the user can resave the **Advanced Report** by clicking **Create Report** at the bottom of the screen.

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When a saved report is modified, a slightly different save screen will be displayed providing options to **Save & Overwrite** or **Save as a New Report Instead**.

Confirm Overwrite of Existing Saved Report

Are you sure that you would like to save your report, Advanced Report? Saving this report will overwrite the existing version of the report with the changes that you just configured on the previous screen.

Note: if "Save as a New Report Instead" is selected, the Create New Saved Report window will be displayed

Activity

1. Create a "Permission for Internet" Advanced Report of all students to include students' first and last name, grade level.
2. Save the report and name it "Permission for Internet".
3. Navigate back to the main Portal page and locate the saved report.
4. Add a filter to the "Permission for Internet" report, to include only the highest-grade level of students at the school.
5. Resave the report; name it appropriately; share the report with the entire school.

Printing the Report

An **Advanced Report** can be exported as a Microsoft Excel spreadsheet by clicking the computer disc icon  located above the generated list, or as a Focus PDF document, by clicking the **Print** icon at the bottom of the page.

