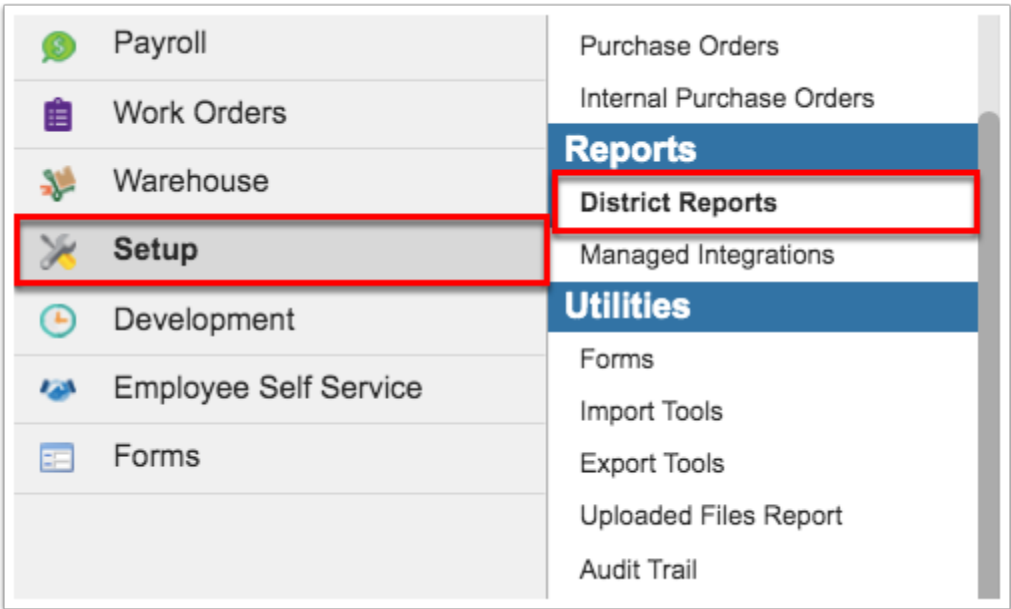


# District Reports

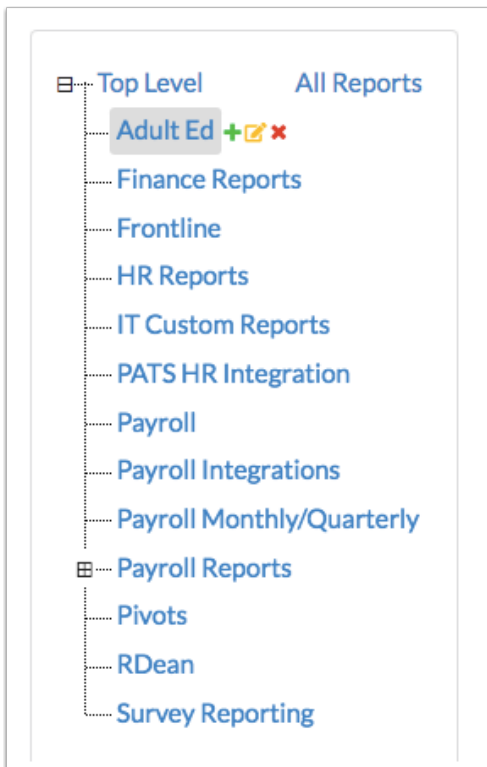
The District Reports module allows for the creation of custom reports using SQL queries. Using this module, editing and running queries in order to create reports is possible. What displays in the District Reports module is dependent upon Profile permissions: View and/or Edit. All reports can be organized via created folders.

## Creating, Editing, & Deleting Report Folders

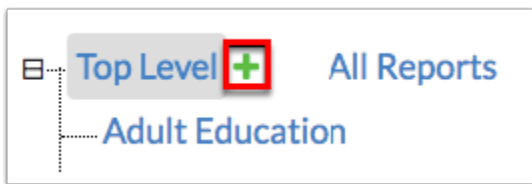
1. From the **Setup** menu, click **District Reports**.



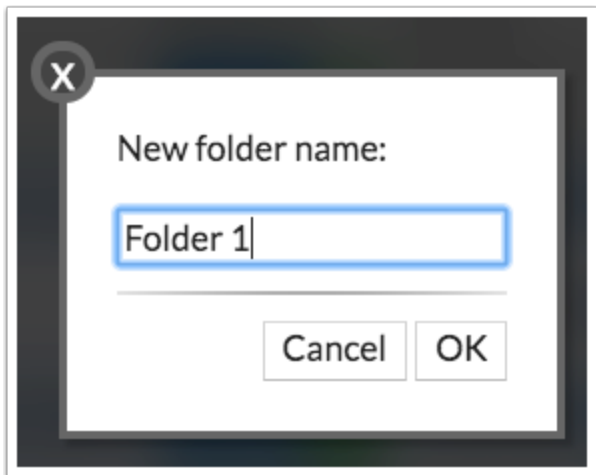
On the left side of the screen are the listed reports. From this section, reports can be organized via folders.



2. To add a new folder, click on the **green plus sign** next to Top Level. This will create a new main folder, which will be listed in alphabetical order along with all of the other folders.



a. Once the green plus sign has been selected, a pop-up will display allowing you to enter a **New folder name**. Type the name of the folder and click **OK**.



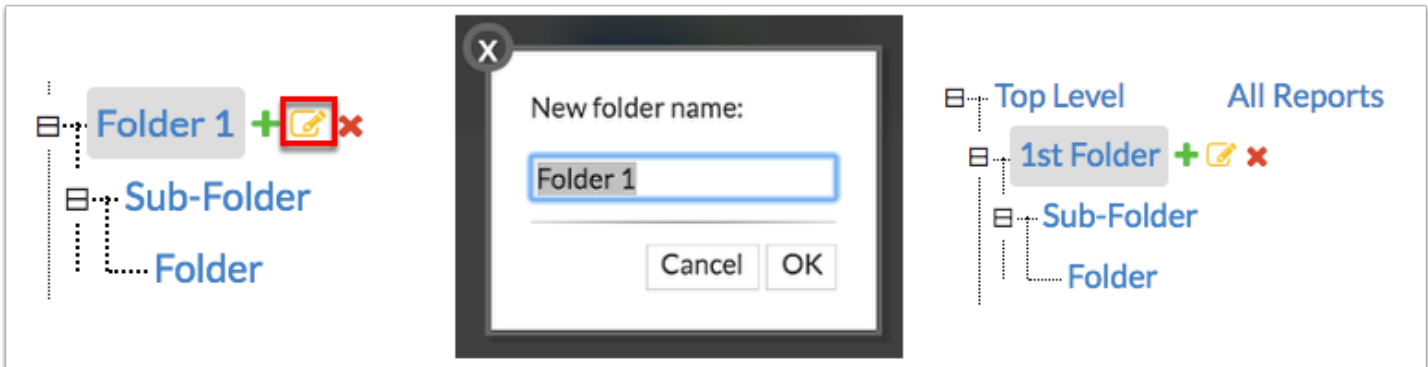
**b.** You will now see your created folder listed. From here, you can also create sub-folders. Additional options automatically display. Click on the **green plus sign** again to create a sub-folder.



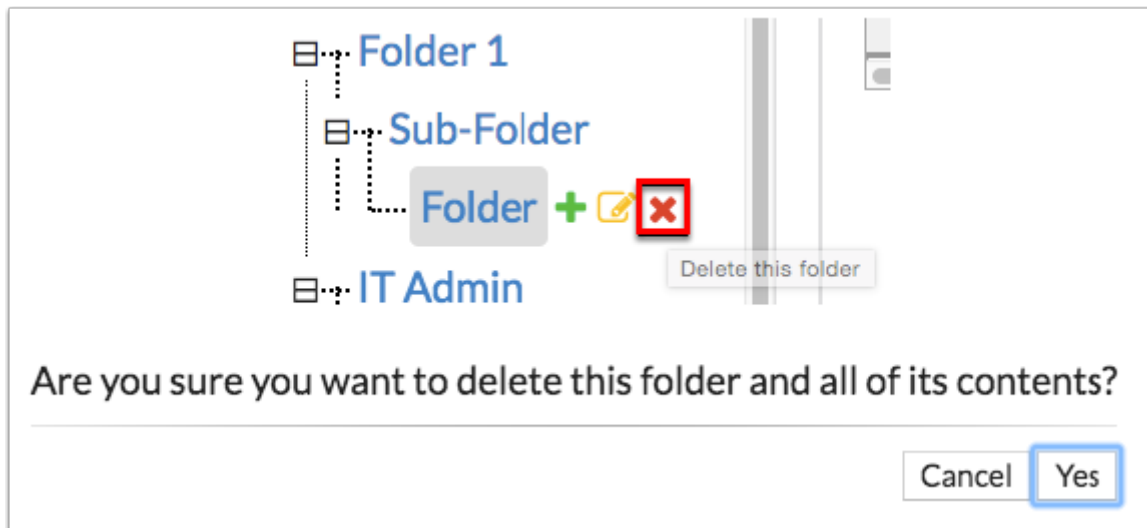
**i.** Another pop-up will display just as before prompting you to name your folder. Once named, you will see the sub-folder appear beneath **Folder 1**. From this point, you have the ability to continue creating as many sub-folders as desired. You can also create another type of folder beneath **Sub-Folder**, as displayed in the image.





**3.** Click on the **pencil icon** to edit the names of folders as needed.



**4.** To delete folders, click on the folder, then click the **red x**. Once clicked, a pop-up will display asking if you are sure you want to delete the folder. Select **Yes** to delete.

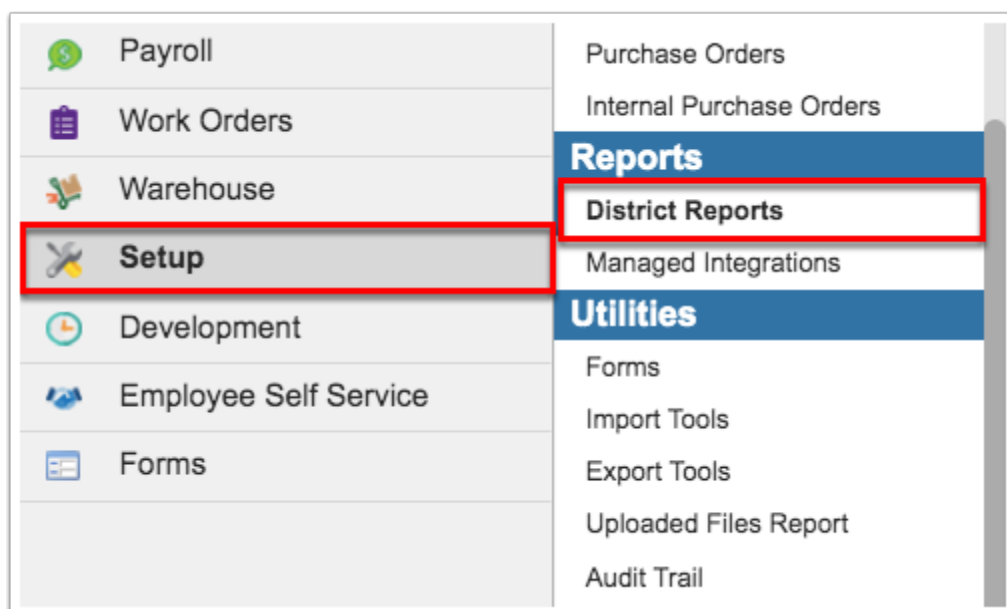


 Please note that in deleting a folder that contains other subfolders, all folders will be deleted.

 Hovering over the icons will tell you what each icon does, as shown in the image above. Hovering over the red x displays: **Delete this folder.**

## Creating & Deleting Reports

1. From the **Setup** menu, click **District Reports**.



2. To begin creating a new custom report, a folder must first be created. Once the folder can be created, click on it to open additional folder/report options. Note: More information on adding folders can be found in the [Creating, Editing, & Deleting Report Folders](#) section.

The screenshot shows a report creation interface. On the left is a sidebar with a tree view of folders: Top Level, Adult Ed, Finance Reports, Folder 1 (with a plus icon), Frontline, and HR Reports. The main area has a header with 'Export' and 'Filter: OFF'. Below is a table with columns: Title, Edit/Export/Run, Folder, Description, Profiles, Schools, and Options. The 'Folder' column shows 'Folder 1'. The 'Options' column has checkboxes for 'Chart' and 'Portal Alert'.

Title	Edit/Export/Run	Folder	Description	Profiles	Schools	Options
	<a href="#">Edit</a>	Folder 1				<input type="checkbox"/> Chart <input type="checkbox"/> Portal Alert

💡 If you do want to create a report in a specific folder, you can create the report in the default folder: **Top Level** where it will be stored for further use.

3. To add a report to your folder, enter a **Title** and a **Description**. The Description field is optional. However, you can utilize this field if you would like information about the report to display for users running the report.

4. From the **Profiles** pull-down, select which profiles/group of users you would like to have access to the report.

Profiles ▾ Schools ▾ Op

504, Ass... ▾

Filter

Check all visible Clear selected

- ☒ 504
- ☐ ADHS
- ☒ Asst. Directors
- ☐ Auditing
- ☐ Bookkeeper

**⚠** If the **Profile** pull-down is left null, the report will be available for ALL profiles/users. You must also select your own profile in order to view the specific report.

**i** The **Profiles** setting here will give the profiles access to the report. To control viewing and/or editing permissions for **District Reports** menu options, navigate from the **Setup** menu to [Profiles](#). Select the **Profiles** in question from the pull-down. Scroll down to Setup > District Reports. Select the **View** check box for District Reports to give the profile(s) view only permission. Select the **View** check box for Edit District reports to give the profile(s) editing permissions.

Reports	View
<b>District Reports</b>	<input checked="" type="checkbox"/>
Edit District Reports	<input checked="" type="checkbox"/>
<b>Managed Integrations</b>	<input checked="" type="checkbox"/>
Edit Managed Integrations	<input checked="" type="checkbox"/>

**5.** From the **Schools** pull-down, select the specific schools that should have access to your report.

Profiles

Schools

Options

504, Ass...

Career A...

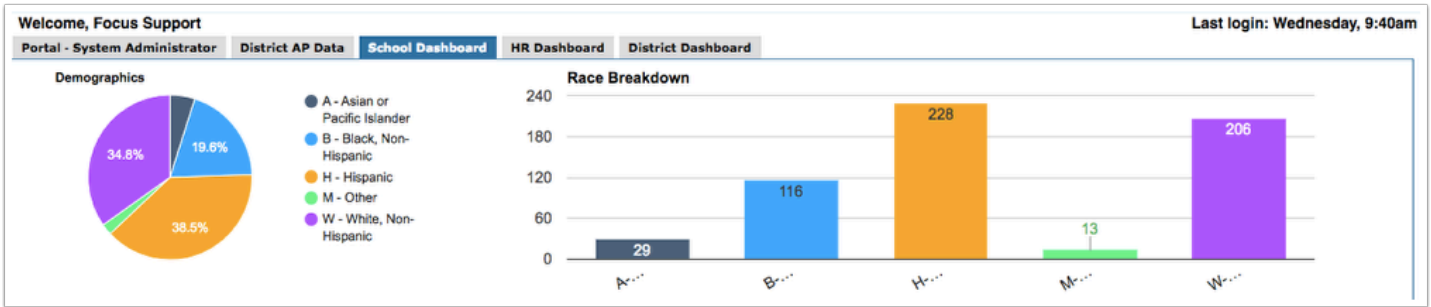
☐ Chart
 ☐ Portal Al...

Filter

[Check all visible](#)
[Clear selected](#)

☐ Applicants
 ☒ Career Academies of Seminole
 ☐ Adult
 ☒ Adult Education
 ☒ Evening School
 ☐ K-12 Course History
 ☐ Community

6. Select the **Chart** check box to generate the report as a graph or chart. The select query must contain an aggregate function.










The only major change that needs to be made from a traditional select query is that a column alias needs to be provided for the field that should be displayed in the graph. The aggregate function used to provide the count will need to be denoted as the value.


7. Select the **Portal Alert** check box to display an alert on the Portal page for users who have permission to view the report. The report will appear in the District Reports module on the user’s Portal.

### Options

☒ Chart
 ☒ Portal Alert

District Reports

-  [134 Records - Active Staff Count \(Charter\)](#)
-  [1400 Records - Active Staff Count \(Public\)](#)
-  [2 Records - Frontline New Hire Report](#)
-  [2 Records - New Hire AD Import](#)
-  [25 Records - School/Dept Entry LV Counts](#)
-  [4 Records - School/Dept Entry MISC Counts](#)
-  [7 Records - School/Dept Entry OT](#)

 Note that the query will execute each time you or the user is on the Portal page.



8. When all fields have been completed and all selections have been made (except the Edit feature), press **Enter** while in any of the text fields to save the report.

Export  








Filter: OFF

Title	Edit/Export/Run	Folder	Description	Profiles	Schools	Options
My Report	 Edit  	Folder 1	Description for	Syst... ▼	▼	<input checked="" type="checkbox"/> Chart <input checked="" type="checkbox"/> Portal Alert

You will know if your report has saved when the line turns blue.

Export  

Filter: OFF

Title	Edit/Export/Run	Folder	Description	Profiles	Schools	Options
<input type="text"/>	 Edit  	Folder 1	<input type="text"/>	▼	▼	<input type="checkbox"/> Chart <input type="checkbox"/> Portal Alert
 My Report	 Edit  	Fol... ▼	Description for	Syst... ▼	▼	<input checked="" type="checkbox"/> Chart <input checked="" type="checkbox"/> Portal Alert


You will also see a **red minus sign** appear; click it to delete the report. A pop-up will display asking if you are sure; select **OK** to delete the report. Note: Although you have saved the report, edits can still be made.



Are you sure you want to delete this record?

Cancel

OK

 If a report has been saved then the **Title** of the report is changed, the **Profiles** pull-down will need to be reset. This applies before and after saving a query to a report.

9. After the report has been saved, the **Folder** field will become a pull-down. From here, you can move the report to a different folder. All folders created will be listed here.

Folder	Description
Folder 1	
Folder 1	Description for User

Filter

\* Top Level \*

Adult Education

CTAE

Folder 1

Folder 1 > Sub-Folder

Folder 1 > Sub-Folder > Fol...

Immunizations

Integrations

IT Admin

IT Admin > Testing

## Editing & Running Reports

1. Once a report has been created in a folder, you will want to add and edit the query that makes up the report. Select the folder, then click on the blue **Edit** button to begin.



X

My Report

Edit Variables

```

select sc.custom_327 as Enr_school, s.student_id, s.last_name, s.first_name, sg.short_name as grade, sr.year, sr.custom_7 as Grade_Taken, sr.custom_5 as District, sr.custom_6 as School,
sr.course_num, sr.course_title, grade_title, credits, credits_earned, sr.custom_1 as course_flag1, sr.custom_2 as course_flag2, sr.custom_3 as course_flag3, sr.custom_4 as course_flag4,
weighted_gpa_points, sr.custom_15 as Dist Learning, sr.online_course

from students s, student_enrollment se, student_report_card_grades sr, school_gradelevels sg, schools sc

where s.student_id = se.student_id and se.grade_id = sg.id and se.school_id = sc.id and se.year=2017 and se.end_date is null and s.student_id = sr.student_id and sr.course_history = 'Y'
and se.school_id = {SCHOOL_ID};

```

Edit Export Run

Validate Save

3. Enter or paste your query in the text box provided. Then click the **Validate** button.

Validate

Save

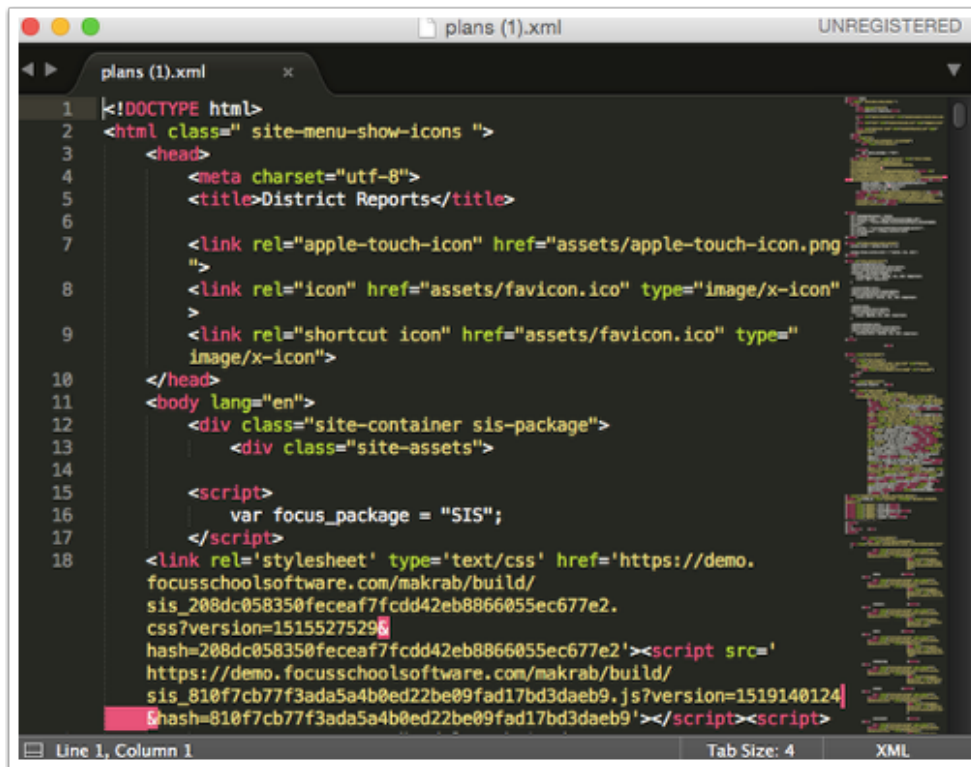
4. If your query has errors, they will be indicated by the **information (i) icon**. The errors display next to the icon, you can also hover over the icon with the mouse to see the errors. Notice that the Save button will not be active until your query is error-free and validated via the Validate button. Once corrections have been made, click the **Validate** button again for additional errors or for an indication that the query is ready to be saved.

1. SQL: select sc.custom\_327... Error: SQLSTATE[42P01]: Undefined table: 7 ERROR: missing FROM-clause entry for table "she" at character 742

SQLSTATE[42P01]: Undefined table: 7 ERROR: missing FROM-clause entry for table "she" at character 742

Validate Save

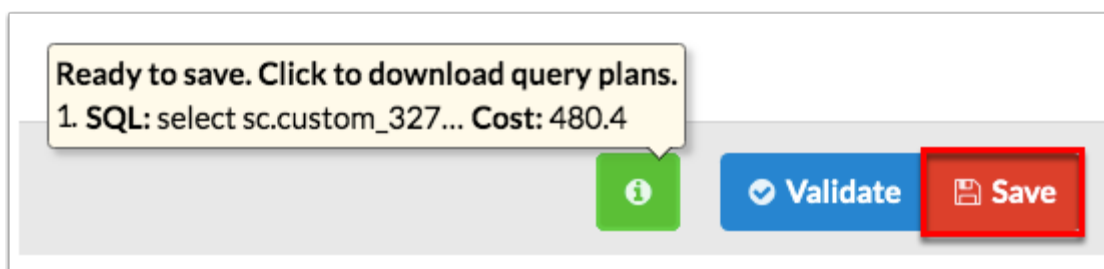
💡 Click on the **information (i) icon** to download the query plans and open with a query program, such as Sublime Text, as shown in the image. From here, you can edit and re-enter the query when complete.



```
1 <!DOCTYPE html>
2 <html class=" site-menu-show-icons ">
3   <head>
4     <meta charset="utf-8">
5     <title>District Reports</title>
6
7     <link rel="apple-touch-icon" href="assets/apple-touch-icon.png"
8     >
9     <link rel="icon" href="assets/favicon.ico" type="image/x-icon"
10    >
11    <link rel="shortcut icon" href="assets/favicon.ico" type="
12    image/x-icon">
13  </head>
14  <body lang="en">
15    <div class="site-container sis-package">
16      <div class="site-assets">
17
18        <script>
19          var focus_package = "SIS";
20        </script>
21        <link rel='stylesheet' type='text/css' href='https://demo.
22        focusschoolsoftware.com/makrab/build/
23        sis_208dc058350feceaf7fcdd42eb8866055ec677e2.
24        css?version=1515527529&
25        hash=208dc058350feceaf7fcdd42eb8866055ec677e2'><script src='
26        https://demo.focusschoolsoftware.com/makrab/build/
27        sis_810f7cb77f3ada5a4b0ed22be09fad17bd3daeb9.js?version=1519140124
28        &hash=810f7cb77f3ada5a4b0ed22be09fad17bd3daeb9'></script><script>
```

**i** If you are entering multiple queries, just be sure the queries are separated with a semicolon and the system will automatically recognize that there is more than one query.

5. If your report is error-free, as indicated by the **information (i) icon**, click the **Save** button to save and then close the Edit module.



6. Before saving the report, if you have local variables that must be entered, click **Edit Variables** to begin.

[⚙️ Edit Variables](#)

« Prev   Page: 1 / 2   Next »
Filters: OFF

Variable ↕	Title ↕	Default ↕	Options ↕	Type ↕
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	Checkbox ▼
LCP_PROGRAM	LCP Program		Academic Skills for Ac	Pull-down ▼
OCP_PROGRAM	OCP Program		Accounting Operation:	Pull-down ▼
AGE_PROGRAM	AGE Program		9900000 [9900000]	Pull-down ▼
DATE_RANGE_END	{DATE_RANGE_			Date ▼
START_DATE	Start Date			Date ▼
END_DATE	End Date Range			Date ▼
SCHOOL	School Name		Clearwater Adult [23]	Pull-down ▼

An alert will display if variables are given the same name as system variables or if duplicate variable names are used.

**a.** The top, blank row of the table is used to add a new custom variable. Begin by entering a **Variable** name.

**b.** Enter the interface **Title**. This is the title that will display for the variable when the user runs the report. For example, the Variable name might be {FIRST\_NAME} and the interface Title might be First Name.

**c.** Enter a **Default** value, if desired.

**d.** Select the data **Type**. Options include Checkbox, Date, Pull-down, Pull-down Query, and Text.

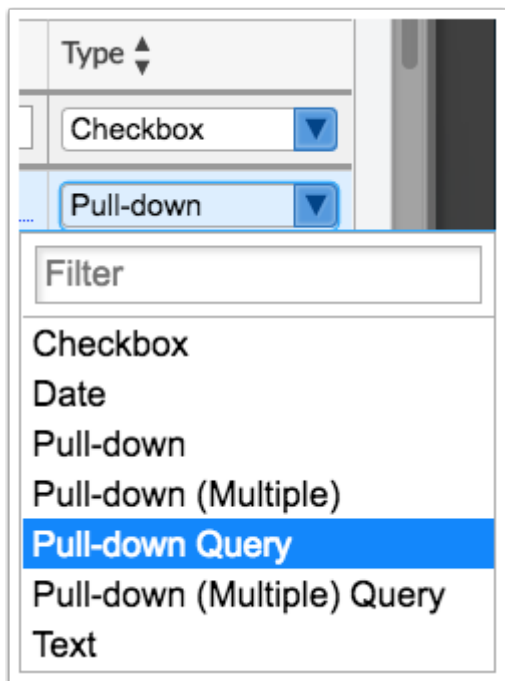
**Checkbox** variable: Users will select from check boxes to generate the report.

**Date** variable: Users will select a date to generate the report.

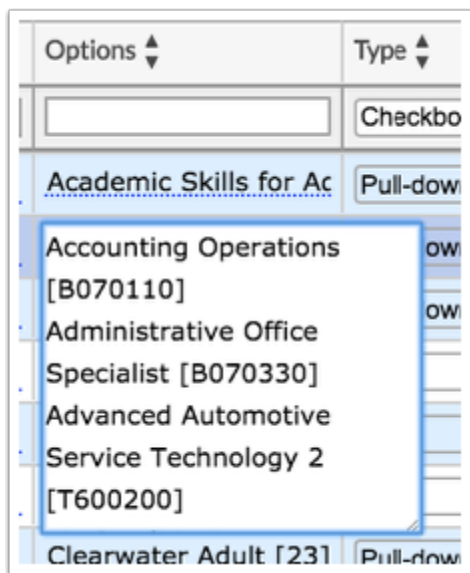
**Pull-down** variable: Users will select a pull-down option to generate the report. Note: **Pull-down (Multiple)** allows users to select multiple options from the pull-down in order to generate the report.

**Pull-down Query** variable: Selecting the pull-down query variable will allow users to use a query to generate the select options for a pull-down upon running the report. Note: **Pull-down (Multiple) Query** allows users to select multiple options from the pull-down in order to generate the report.

**Text** variable: Users will enter text to generate the report (for example, a course number to view that course in the report).

A screenshot of a software interface showing a configuration menu. At the top, there's a 'Type' dropdown menu with 'Checkbox' and 'Pull-down' visible. Below this is a 'Filter' input field. A list of options is displayed below the filter: 'Checkbox', 'Date', 'Pull-down', 'Pull-down (Multiple)', 'Pull-down Query' (which is highlighted in blue), 'Pull-down (Multiple) Query', and 'Text'.

e. If the data Type for the variable is pull-down, enter the pull-down **Options** in the provided field. Enter one option per line. Enter the name of the option that will display in the pull-down followed by a space and then in square brackets enter the value stored in the database related to that option.

A screenshot of a table with two columns: 'Options' and 'Type'. The 'Options' column contains a list of academic skills and their database codes, such as 'Accounting Operations [B070110]', 'Administrative Office Specialist [B070330]', 'Advanced Automotive Service Technology 2 [T600200]', and 'Clearwater Adult [231]'. The 'Type' column shows the data type for each row, with 'Pull-down' visible for several rows. The row containing 'Accounting Operations [B070110]' is highlighted in blue.

f. When all fields are complete, while in one of the fields, press **Enter** to save the variable data. You will know if the variable has saved when the line turns blue. You will also see a **red minus sign** appear; click it to delete the variable. A pop-up will display asking if you are sure; select **OK** to delete the record. Note: Although you have saved the variable, edits can still be made.

Are you sure you want to delete this record?

Cancel

OK

7. Click on **Edit Variables** again to close the window and return to editing the report.

8. **Save** the report. Now, you can test run your report. Note: The Export and Run buttons will become active once the report has been saved. The Edit button will become active upon running the report.

Edit

Export

Run

i

Validate

Save

9. Click the **Run** button from the Edit window or close the Edit window and run the report from the District Reports screen.

## My Report

1. SELECT

Records: 6,455 Time: 0.45s

« Prev Page: 1 / 250 Next »

5,000 Records

Export:  

Filters: OFF

school_year	syear	student_id	student_name	school	custom_32	program	transition_to_abe	transition_t
2017-2018	2017	10788	Gil,	1032	404	1. ESOL		
2017-2018	2017	11199	Hoffmann,	0712	404	1. ESOL	Y	
2017-2018	2017	11799	Cano,	2471	404	1. ESOL		
2017-2018	2017	12670	Le Thuyen	1032	404	1. ESOL		

Edit








Run

Show 5000 Records

**i** In the bottom right corner, the number of records showing is listed. Click in the **number field** to change it. In the image provided, the number of records has been changed from 5000 to 2000.








Show  Records

10. Click the **Export** button to download a file containing a zip of .csv files for each dataset in the District Report. The default limit of 20000 records is bypassed in this download, so it contains all rows of all datasets. The exported report is generated differently from running the report; therefore, the data set can be far greater. Note: The Export button can be accessed from the main District Reports screen or from the Edit/Run report screens.

	Title ▲▼	Edit/Export/Run ▲▼	Folder ▲▼
	<input type="text"/>	 Edit  	Folder 1
	My Report	 Edit  	Fol... ▼

## View Only Profile Permissions

1. From the **Setup** menu, click **District Reports**.

 Payroll	Purchase Orders
 Work Orders	Internal Purchase Orders
 Warehouse	<b>Reports</b>
 <b>Setup</b>	<b>District Reports</b>
 Development	Managed Integrations
 Employee Self Service	<b>Utilities</b>
 Forms	Forms
	Import Tools
	Export Tools
	Uploaded Files Report
	Audit Trail

💡 The report can also be accessed straight from the main Portal page (if a Portal Alert was created). From the **District Reports** section, click on the report link.





<div> <div>« Prev</div> <div>Page: 1 / 15</div> <div>Next »</div> </div> <div> <div>Export</div> <div></div> <div></div> </div> <div>Filter: OFF</div>		
Title ▲	Description ▲	Export/Run ▲
1 schedule * no limit?		<div>Export</div> <div>Run</div>
100 000		<div>Export</div> <div>Run</div>
180 School Calendar Count		<div>Export</div> <div>Run</div>
19119		<div>Export</div> <div>Run</div>
19752		<div>Export</div> <div>Run</div>
Abs since 9_27		<div>Export</div> <div>Run</div>

4. Click **Run** to see the report.

<div> <div>1. SELECT</div> <div>Records: 6,455 Time: 0.43s</div> </div> <div> <div>« Prev</div> <div>Page: 1 / 250</div> <div>Next »</div> </div> <div> <div>5,000 Records</div> <div>Export</div> <div></div> <div></div> </div> <div>Filters: OFF</div>											
school_year ▲	year ▲	student_id ▲	student_name ▲	school ▲	custom_32 ▲	program ▲	transition_to_abe ▲	transition_to_ged ▲	transition_to_aaa ▲	transition_to_psav_same_	
2017-2018	2017	10788	Gil, I	1032	404	1. ESOL					
2017-2018	2017	11199	Hoffmann, D	0712	404	1. ESOL	Y				
2017-2018	2017	11799	Cano, I	2471	404	1. ESOL					
2017-2018	2017	12670	Le, T	1032	404	1. ESOL					
2017-2018	2017	13245	Kattoum, S	2471	404	1. ESOL					
2017-2018	2017	13764	Harney, A	0642	404	1. ESOL					
2017-2018	2017	13764	Harney, A	2471	404	1. ESOL					
2017-2018	2017	14078	Granizo, C	2471	404	1. ESOL					

Show 5000 Records

5. In the bottom right corner, the number of records showing is listed. Click in the text box to change it. In the image provided, the number of records has been changed from 5000 to 2000.

Show  Records

6. Click the **Export** button to download a file containing a zip of .csv files for each dataset in the District Report. The default limit of 20000 records is bypassed in this download, so it contains all rows of all datasets. The exported report is generated differently from running the report; therefore, the data set can be far greater.



- To add more than one filter to a column, click on the **green plus sign**.
- To delete an added filter, click on the **red minus sign**.
- Select the **gray arrow** for additional filtering rules.

Export

Filter: ON

<div> <div>+</div> <div>ac</div> <div>▼</div> </div> <div> <div>-</div> <div>teach</div> <div>▼</div> </div>	<div>+</div> <div></div> <div>▼</div>	<div>+</div> <div></div> <div>▼</div>	<div>+</div> <div></div> <div>▼</div>	<div>+</div> <div></div> <div>▼</div>	<div>+</div> <div></div> <div>▼</div>
Title ▲▼	Edit/Export/Run ▲▼	Folder ▲▼			Schools ▲▼
<div></div> <div></div>	<div>Edit</div> <div></div> <div></div>	* Top Level			
<div>-</div> <div>Academic History with</div>	<div>Edit</div> <div></div> <div></div>	* Top ...	Contains	Not	
			Equals	Not	
			Starts with	Not	
			Ends with	Not	
			Has value	Not	
			Greater	Not	
			Greater or equal	Not	
			Less	Not	
			Less or equal	Not	
			Between	Not	
<div>-</div> <div>Active ESE by GradeL</div>	<div>Edit</div> <div></div> <div></div>	* Top ...			
<div>-</div> <div>Advanced Placement :</div>	<div>Edit</div> <div></div> <div></div>	* Top ...			

For more information on how to use the Filters feature, see the [Filters](#) document.

You can sort data by clicking on any of the headers. Click once for ascending results; click twice for descending results.

◀ Prev

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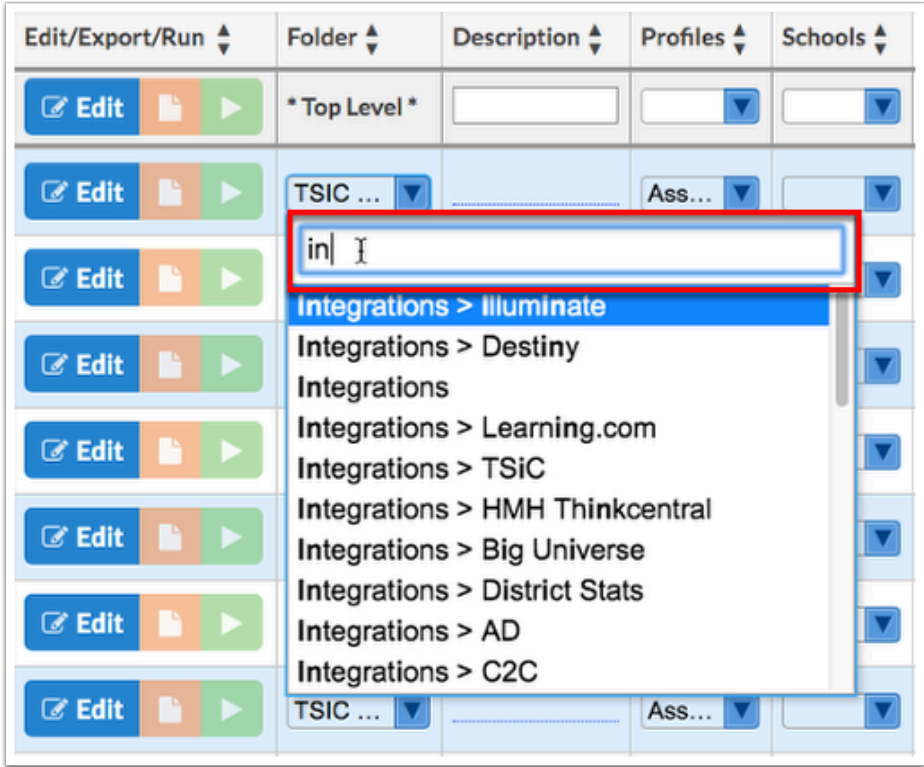
Next ▶

Export

Filter: OFF

Title ▲▼	Edit/Export/Run ▲▼	Folder ▲▼	Description ▲▼	Profiles ▲▼	Schools ▲▼
<div></div> <div></div>	<div>Edit</div> <div></div> <div></div>	* Top Level *			
<div>-</div> <div>TSIC AP Schedules</div>	<div>Edit</div> <div></div> <div></div>	TSIC ... ▼		Ass... ▼	
<div>-</div> <div>TSIC MOS Schedules</div>	<div>Edit</div> <div></div> <div></div>	TSIC ... ▼		Ass... ▼	
<div>-</div> <div>TSIC Full Schedules</div>	<div>Edit</div> <div></div> <div></div>	TSIC ... ▼		Ass... ▼	
<div>-</div> <div>TSIC Roster</div>	<div>Edit</div> <div></div> <div></div>	TSIC ... ▼		Ass... ▼	

Use the **Filter** text box located in select pull-down to quickly find a selection. Begin typing the name or number of the data in question to pull it to the beginning of the list.



Click the **Check all visible** link to select all options in the pull-down. Click **Clear selected** to remove any selections made in the pull-down.

