Advanced Report

The Advanced Report compiles, views, and tracks user-defined student data. The More Search Options feature is used to narrow the criteria for search results that will pull into the report. Data can be filtered in a report and the report can be exported into Excel or a PDF 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.

Advanced Report

There are three important parts to the screen:

1. The **Student Search** allows you to define who will be in the report.

2. Select the **Available Fields** pull-downs to define what will be in the report.

3. Select the **Fields to Include in Report** to display the order of the columns in the report.

Search Criteria

1. Click the **Students** menu and select **Advanced Report**.

2. Search for the group of students to be in the report.

    a. More Search Options (left column) identifies a specific subset of students to be included in the report; the fields are pulled directly from the Focus data fields related to student information that the user's profile has permission to view.

    Click on the gray arrow to open the field for available search criteria. The more fields added, the more limited the search results will be.

3. Select the appropriate **Available Fields** (middle column) to define what fields will be in the report. All tabs located in the **Student Info** screen are listed in this column; each field category can be clicked to reveal a list of blue boxes containing data relevant to that field.

A **Search Fields** text box is available to help locate data fields.

    a. Type in the name or keyword of a field to display the Available Fields.

4. There are two options for moving the blue boxes into the Fields to Include in Report box:

 a. Drag and drop the name of the field.

 b. Click the green plus sign.

5. Fields to include in Report (right column) identifies the information to be shown on the report.

6. Add all appropriate fields from Available Fields.

7. All fields will be ordered as they appear in the box and can be rearranged as needed by dragging and dropping the field box up or down.

8. The field boxes can be deleted by clicking the red **X** or by dragging them back to the left.

9. Click the **Run Report** button. Like other reports in Focus, the heading in each column can be clicked to re-sort the data.

> ℹ️ When a logging field is selected as one of the fields, an option to Include students without log records will appear.
>
> Select the check box and click **Go**.
>
> When selected, all students/users who match the search results will display, regardless if they have a log record.

Modifying Advanced Reports

Click **Modify Report** to edit the **Fields to include in Report** on the previous screen.

❗ Please be aware that this action will result in the original search criteria selected from More Search Options to be reset. However, the Fields to include in Report will be retained.

Filtering Advanced Reports

Results of an **Advanced Report** can be filtered, to display a specific set of data from the results. **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. There are two different ways to filter the Advanced Report.

Option 1: Blue In-Line Filter

1. Turn **Filter ON**. There will be a Filter row at the top of the report.

2. Filter the column(s) necessary to achieve the appropriate results.

3. The filtered report will not save with the applied filters when using the in-line blue Filter. The original search criteria will be saved.

Option 2: Gray Filter

This option allows the filtered report to be saved.

1. Click **Filter**.

2. The field columns in the report will display as options in the Filter Rules pull-down.

3. To filter the results, select the field, condition and criteria by which to filter.

4. Click **Add Rule** to add more than one filter rule.

5. Click **Remove** to delete a filter rule.

6. Once the Filter Rules have been set, click the **Run Filter** button to filter the report results. All Filter Rules can be reset by clicking **Clear Rules**.

7. Once the **Filter Rules** have been set, click the Run Filter button to filter the report results. All Filter Rules can be reset by clicking Clear Rules.

Creating and Saving Reports

1. Click the **Create Report** or **Save Report** button at the bottom of the report screen to save the search criteria and fields of the **Advanced Report**.

2. Name the report. This will allow the report to be run in the future without having to re-enter the criteria and fields.

3. Click **OK**.

ℹ️ Creating a report saves the search criteria and fields. When the report is run on a later date, it updates with the current students who match the parameters. To save a report's results at a specific time, export to Excel or print to PDF.

After clicking OK, a confirmation screen will appear on the Saved Reports tab with a green check mark indicating the report has been saved.
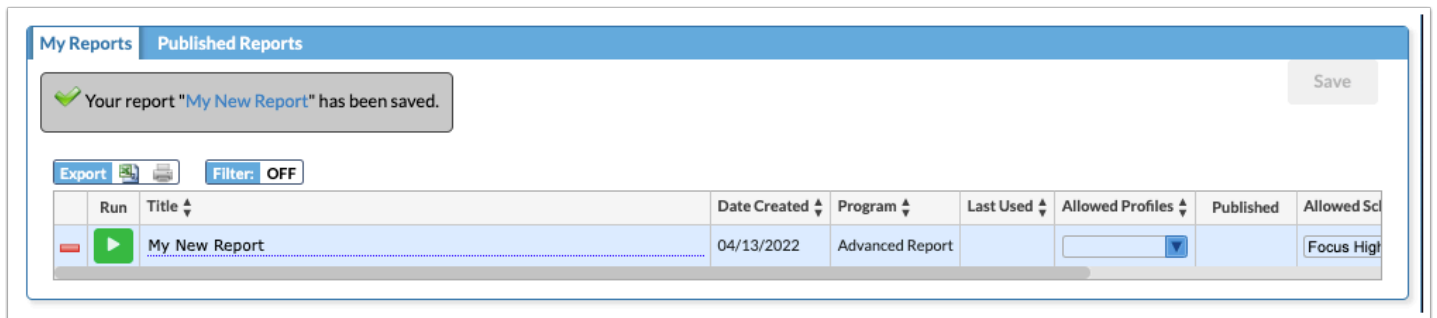
a. Click the blue arrow to run the report.

b. The name of the saved report can also be edited by clicking on the blue dotted line under the report's current title.

c. Click the red dash in the last column to delete the entire report.

Accessed Saved Reports

1. Go to the **Reports** menu and select the report under **My Reports**.

A shortcut to run each user-generated saved report is listed under **My Reports**.

2. Click on **District Reports** to view and run reports created and shared by the district.

3. Click on **Published Reports** to view and run reports shared by other users.

4. Scroll to **Setup** and click on **Saved Reports** to view a list of all user-generated saved reports. Selecting the saved report will allow the report to be run, edited or deleted.

Modifying and Deleting Saved Reports

If the report is **Modified** or **Filter Rules** are added to a **Saved Report** later, the Advanced Report can be resaved after making modifications.

1. Run the Advanced Report that needs changes.

2. Click **Modify Report**.

3. Make the necessary changes.

4. Run the report again.

5. Click **Create Report** at the bottom of the screen.

6. There are 2 options:

   **a. Save & Overwrite:** Overwrites the old report. The old report won't exist anymore.

    b. Save as a New Report Instead: Creates a new report. The old report will still exist. If **Save as a New Report Instead** is selected, the **Create New Saved Report** window will be displayed.
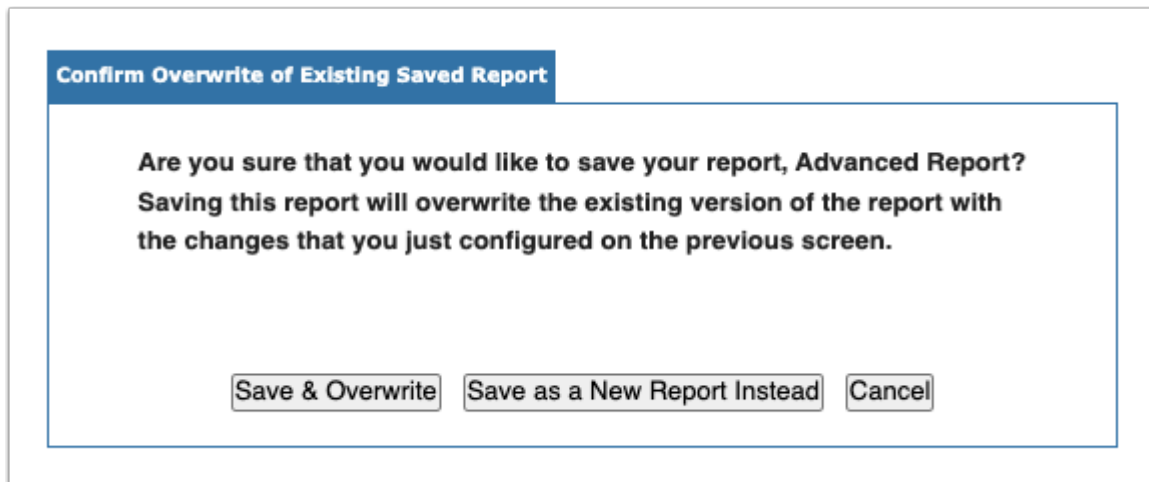
Deleting Reports

Reports can be deleted from the **Saved Reports** screen, on the **My Reports** tab.

1. Locate the report that will be deleted and click the red minus sign, located in the right-most column of the listed reports.
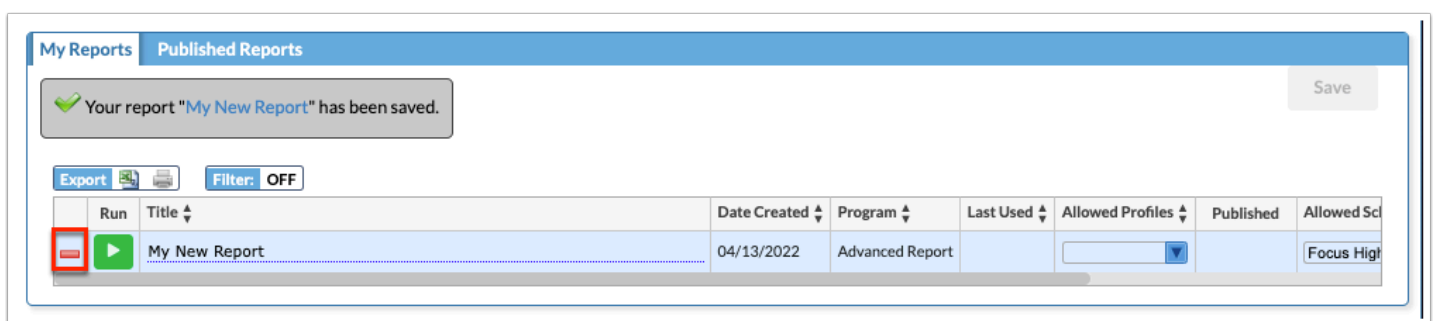
2. A confirm delete pop-up window displays; select **OK** to finalize the report deletion.

Printing Reports

An open **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 screen.

Activity

Create an Advanced Report of all active ELL students that includes columns for their ELL status and any other columns of your choice.

Reminder: This is a training environment; reports will not be available on the production site.