INFocus – Ad Hoc Reporting Tool

Introduction

INFocus Ad Hoc reporting module allows a user, with permission, to create reports and dashboards.

The storage system is divided into two sections:

- **Personal Reports**: Reports that the user created and to which only that user has rights.
- **Shared Reports**: Reports that are shared among users. Only the person who created a shared report may modify that report.
Functions
The following functions are available:

- **Add**: Hover over Add to display the drop-down list to create a report, dashboard or folder.
- **Delete**: Click Delete to remove any selected item(s) from the list.
- **Copy**: Click Copy to replicate any selected item(s).
- **Move**: Click Move to move any selected item(s) to another location.
- **Find Reports**: Click Find Reports to perform a contain search of the Name column for the associated text. Click on the icon in the text box to clear the text and refresh the list. This option is configurable and may be hidden.

Icons

- - This action icon indicates that only a single action may be performed on the item. Click to perform the action. Typically the single action is **Modify**.
- - This action icon indicates there are multiple actions that may be performed on the item. Hover the mouse over the icon to display the dropdown list of actions available. The available actions are dependent upon the configuration and the item type; however, the list may include Modify, Rename, Copy, Move, Schedule, Archive and View Dependencies.

The following icons are used to signify a report's status or type:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Ad Hoc Report</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Ad Hoc Report - Scheduled</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Subscribed Ad Hoc Report</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Ad Hoc Dashboard</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Imported or Web Studio Report*</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Scheduled Imported or Web Studio Report*</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Subscribed Imported or Web Studio Report within InFocus.*</td>
</tr>
</tbody>
</table>
Folders

Creating Folders

A folder in INFocus allows the user to organize and store reports and dashboards.

When the user selects to add a folder, it is created in the Personal Reports area. Depending upon rights, the user may or may not have access to create a folder in the shared reports area. When a folder is created in the Shared Reports area, the user may assign which roles/groups may access reports or dashboards stored in that area.
Modifying Folders

Click the pencil icon to modify the folder.

The following screen will display.

If modifying a folder in the shared reports area, the option to select roles will also be available.

Reports

Creating/Modifying From a Template

This option displays the wizard tab for data elements.

- Select the type of report to create.
The next step in report creation is **Selecting/Modifying a data source.** A table or view is selected by clicking in the box next to the table/view name.

The **Exclude Duplicate Rows** indicates that only distinct rows should be returned from the database when the report is executed. Rows with identical values for all selected columns will be excluded.

If the data source needs to be adjusted after the report is created, the user may select **Modify Data Source** in the lower left corner of the window.
Add/Remove

- The list of views and tables will display in alphabetical order.

- Click the + sign to expand the view to see the specific data fields held in the view/table.
- The magnifying glass icon may be used to view the data as it is stored in the file.

Note: INFocus will automatically adjust the list of views based upon the selection. Order of selection is important. For example, if the user selects Student first, the user will be unable to select Daily Absence. If the user selects Daily Absence first, he or she may select Student.
Below is the list of available views:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence Reason</td>
<td>The list of valid reasons for a student’s absence.</td>
</tr>
<tr>
<td></td>
<td>Examples: Doctor’s Note, Field Trip, Suspended</td>
</tr>
<tr>
<td>Academic Session</td>
<td>Contains basic information about each academic session including name, start</td>
</tr>
<tr>
<td></td>
<td>date, and end date.</td>
</tr>
<tr>
<td>Address</td>
<td>Contains detailed information about each address for students, staff members,</td>
</tr>
<tr>
<td></td>
<td>and contacts.</td>
</tr>
<tr>
<td>Alpha Grade</td>
<td>The list of valid alphabetic grades that appear on a student’s report card.</td>
</tr>
<tr>
<td></td>
<td>Examples: A, B, C, D, F</td>
</tr>
<tr>
<td>Board Violation</td>
<td>The list of valid board violations that may be associated to a discipline</td>
</tr>
<tr>
<td></td>
<td>incident.</td>
</tr>
<tr>
<td>Bus</td>
<td>Contains information about each bus including name, driver, route, and</td>
</tr>
<tr>
<td></td>
<td>capacity.</td>
</tr>
<tr>
<td>Bus Route</td>
<td>Contains information about each bus route. Each bus may be assigned an AM</td>
</tr>
<tr>
<td></td>
<td>route and a PM route.</td>
</tr>
<tr>
<td>Class Instructional Program</td>
<td>The list of valid classification of instructional programs that may be</td>
</tr>
<tr>
<td></td>
<td>assigned to a course.</td>
</tr>
<tr>
<td>Contact Relationship</td>
<td>The list of valid relationships between a student or staff member and their</td>
</tr>
<tr>
<td></td>
<td>contacts.</td>
</tr>
<tr>
<td>Course</td>
<td>Contains information about each course.</td>
</tr>
<tr>
<td>Course Type</td>
<td>The list of valid course types. A course type may be assigned to each course.</td>
</tr>
<tr>
<td>Daily Absence</td>
<td>Contains information about each school day that a student was absent in part</td>
</tr>
<tr>
<td></td>
<td>or whole.</td>
</tr>
<tr>
<td>Day Type</td>
<td>The list of valid day types. Day types are used to schedule sections that</td>
</tr>
<tr>
<td></td>
<td>meet at different times on different days.</td>
</tr>
<tr>
<td></td>
<td>Examples: Monday, Tuesday, Red Day, Blue Day</td>
</tr>
<tr>
<td>Degree</td>
<td>The list of valid academic degrees that have been earned by a staff member.</td>
</tr>
<tr>
<td></td>
<td>Examples: Bachelor’s Degree, Master’s Degree</td>
</tr>
<tr>
<td>Difficulty Level</td>
<td>The list of valid difficulty levels that may be assigned to a course.</td>
</tr>
<tr>
<td></td>
<td>Examples: Regular, Advanced, Honors</td>
</tr>
<tr>
<td>Discipline</td>
<td>Contains information about each disciplinary occurrence including primary</td>
</tr>
<tr>
<td></td>
<td>infraction, primary action, and primary disposition.</td>
</tr>
<tr>
<td>Discipline Action</td>
<td>The list of valid disciplinary actions that may be assigned to an occurrence.</td>
</tr>
<tr>
<td></td>
<td>Examples: Letter to Parent, Detention</td>
</tr>
<tr>
<td>Disposition</td>
<td>The list of valid disciplinary dispositions that may be assigned to an</td>
</tr>
<tr>
<td></td>
<td>occurrence.</td>
</tr>
<tr>
<td></td>
<td>Examples: Demerit, Expelled, Suspended</td>
</tr>
<tr>
<td>District Student</td>
<td>Contains information about each student in the district. A student who is</td>
</tr>
<tr>
<td></td>
<td>enrolled in multiple schools or multiple years will have a single entry.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Contains email addresses for each student, staff member, and contact.</td>
</tr>
<tr>
<td>Enrolled Student</td>
<td>Contains information about each student who is currently enrolled in an</td>
</tr>
<tr>
<td></td>
<td>academic session. Registered students, withdrawn students, and students</td>
</tr>
<tr>
<td></td>
<td>enrolled in previous academic sessions are not included.</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>The list of valid ethnicities that may be assigned to a student.</td>
</tr>
<tr>
<td></td>
<td>Examples: Asian, Black, White</td>
</tr>
<tr>
<td>Exceptionality</td>
<td>The list of valid primary and secondary exceptionalities that may be</td>
</tr>
<tr>
<td></td>
<td>assigned to a student.</td>
</tr>
<tr>
<td></td>
<td>Examples: Autism, Gifted, Visual Impairment</td>
</tr>
<tr>
<td>View</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Fee</td>
<td>Contains information about each student charge, payment, refund, and adjustment.</td>
</tr>
<tr>
<td>Funding Method</td>
<td>The list of valid funding methods that may be assigned to a course.</td>
</tr>
<tr>
<td>Gender</td>
<td>The list of valid genders that describe students, staff members, and contacts.</td>
</tr>
<tr>
<td></td>
<td>Examples: Female, Male</td>
</tr>
<tr>
<td>Generation</td>
<td>The list of valid generations that comprise a student, staff member, or contact’s name.</td>
</tr>
<tr>
<td></td>
<td>Examples: Jr., Sr., III</td>
</tr>
<tr>
<td>Gpa</td>
<td>Contains the cumulative GPA for each student. A separate GPA is calculated for each school the student attended, because each school defines its own rules for calculating GPA.</td>
</tr>
<tr>
<td>Graded Item</td>
<td>Contains the line items that appear on a student’s report card.</td>
</tr>
<tr>
<td></td>
<td>Examples: Q1 Grade, Q1 Exam, Final Grade</td>
</tr>
<tr>
<td>Grade Level</td>
<td>The list of valid grade levels.</td>
</tr>
<tr>
<td></td>
<td>Examples: Kindergarten, 1st Grade, 2nd Grade</td>
</tr>
<tr>
<td>Grading</td>
<td>Contains information about student grades that appear on report cards.</td>
</tr>
<tr>
<td>Grading Comment</td>
<td>Contains information about student comments that appear on report cards.</td>
</tr>
<tr>
<td>Grading Period</td>
<td>Contains the quarters, semesters, or trimesters that appear on a student’s report card.</td>
</tr>
<tr>
<td></td>
<td>Examples: Quarter 1, Semester 2</td>
</tr>
<tr>
<td>Guardian</td>
<td>Contains information about each student contact who is a guardian for that student.</td>
</tr>
<tr>
<td>Homeroom</td>
<td>Contains information about each homeroom in the school including its name, room, and teacher.</td>
</tr>
<tr>
<td>Infraction</td>
<td>The list of valid disciplinary infractions that may be assigned to an occurrence.</td>
</tr>
<tr>
<td></td>
<td>Examples: Excessive Talking, Obscene Language, Truancy</td>
</tr>
<tr>
<td>Instructional Setting</td>
<td>The list of valid instructional settings that may be assigned to a course.</td>
</tr>
<tr>
<td>Internet Messenger Provider</td>
<td>The list of valid providers for instant messenger accounts.</td>
</tr>
<tr>
<td></td>
<td>Examples: AOL, MSN</td>
</tr>
<tr>
<td>Language</td>
<td>The list of valid languages that are spoken by students, staff members, and contacts.</td>
</tr>
<tr>
<td></td>
<td>Examples: English, French, Spanish</td>
</tr>
<tr>
<td>Least Restrictive Environment</td>
<td>The list of valid least restrictive environments that may be assigned to a student.</td>
</tr>
<tr>
<td>Limited English</td>
<td>The list of valid classifications for limited English proficiencies.</td>
</tr>
<tr>
<td>Location</td>
<td>The list of valid locations that may be assigned to a room.</td>
</tr>
<tr>
<td></td>
<td>Examples: 1st Floor, 2nd Floor, Building #2</td>
</tr>
<tr>
<td>Lunch Program</td>
<td>The list of valid lunch programs.</td>
</tr>
<tr>
<td></td>
<td>Examples: Free, Reduced, Paid</td>
</tr>
<tr>
<td>Marital Status</td>
<td>The list of valid marital statuses that may be assigned to students, staff members, and contacts.</td>
</tr>
<tr>
<td></td>
<td>Examples: Single, Married</td>
</tr>
<tr>
<td>Migrant Family</td>
<td>The list of valid statuses that describe whether a student is in a migrant family.</td>
</tr>
<tr>
<td>Payment Method</td>
<td>The list of valid payment methods for a payment.</td>
</tr>
<tr>
<td></td>
<td>Examples: Cash, Check</td>
</tr>
<tr>
<td>Period</td>
<td>The list of valid periods during which a section can meet.</td>
</tr>
<tr>
<td></td>
<td>Examples: 1st period, 2nd period</td>
</tr>
<tr>
<td>View</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Period Absence</td>
<td>Contains information about each period that a student was absent in part or whole.</td>
</tr>
<tr>
<td>Person</td>
<td>Contains basic demographic information about each student, staff member, or contact.</td>
</tr>
<tr>
<td>Proper Title</td>
<td>The list of valid proper titles that may be applied to a student, staff member, or contact’s name. Examples: Mr., Mrs., Ms.</td>
</tr>
<tr>
<td>Religion</td>
<td>The list of valid religions that may be assigned to a student, staff member, or contact.</td>
</tr>
<tr>
<td>Residency Status</td>
<td>The list of valid residency statuses that may be assigned to a student, staff member, or contact.</td>
</tr>
<tr>
<td>Room</td>
<td>Contains information about each room in a school.</td>
</tr>
<tr>
<td>Roster</td>
<td>The list of students who are scheduled in each section.</td>
</tr>
<tr>
<td>School</td>
<td>Contains information about each school in the district.</td>
</tr>
<tr>
<td>School Category</td>
<td>The list of valid school categories that may be assigned to a school. Examples: Elementary School, Middle School, High School</td>
</tr>
<tr>
<td>Section</td>
<td>Contains information about each section including the section number, room, and primary teacher.</td>
</tr>
<tr>
<td>Section Schedule</td>
<td>The list of days and periods during which a section meets.</td>
</tr>
<tr>
<td>Section Staff</td>
<td>The list of staff members assigned to each section including the primary teacher.</td>
</tr>
<tr>
<td>Special Education Status</td>
<td>The list of valid special education statuses that may be assigned to a student.</td>
</tr>
<tr>
<td>Staff</td>
<td>Contains information about each staff member.</td>
</tr>
<tr>
<td>Staff Classification</td>
<td>The list of valid staff classifications that may be assigned to a staff member.</td>
</tr>
<tr>
<td>Staff Contact</td>
<td>The list of contacts for each staff member.</td>
</tr>
<tr>
<td>Staff Custom</td>
<td>Contains extended information about staff members that is stored in custom fields. Custom fields are often used for state-specific reporting.</td>
</tr>
<tr>
<td>Staff Role</td>
<td>The list of valid roles that are assigned to a staff member in a section. Examples: Teacher, Facilitator, Substitute</td>
</tr>
<tr>
<td>Statute Violation</td>
<td>The list of valid statute violations that may be assigned to a disciplinary incident.</td>
</tr>
<tr>
<td>Student</td>
<td>Contains information about each student enrolled in each academic session. A student who is enrolled in multiple schools will have separate entries. A student who is enrolled in the same school for multiple academic sessions will have separate entries. This view contains more information than the District Student view, such as enrollment status, grade level, homeroom, and lunch program.</td>
</tr>
<tr>
<td>Student Contact</td>
<td>The list of contacts for each student.</td>
</tr>
<tr>
<td>Student Custom</td>
<td>Contains extended information about students that is stored in custom fields. Custom fields are often used for state-specific reporting.</td>
</tr>
<tr>
<td>Student Program</td>
<td>The list of programs in which each student participates.</td>
</tr>
<tr>
<td>Teaching Method</td>
<td>The list of valid teaching methods that may be assigned to a course.</td>
</tr>
<tr>
<td>Telephone Number</td>
<td>The complete list of telephone numbers for a student, staff member, or contact.</td>
</tr>
<tr>
<td>Term</td>
<td>Contains information about each term. Examples: Quarter 1, Semester 2</td>
</tr>
<tr>
<td>Transcript</td>
<td>Contains detailed information about each section that appears in a student’s transcript.</td>
</tr>
<tr>
<td>Transport Method</td>
<td>The list of valid transportation methods that may be assigned to a student. Examples: Transported, Not Transported</td>
</tr>
</tbody>
</table>
Calculated Columns

Calculated Columns offer the ability to create new columns for the report based on a specified formula applied to data from existing columns. Calculations may be performed on dates, numeric and non-numeric data.

- Calculated columns must be saved and given a name in order to be used in any report.
- Operators may be selected from icons or may be typed into the Definition box. The More drop-list allows the selection of AND, OR and NOT parameters.
- Test allows the user to view how the calculated column will display.
- New clears the Definition box.

Date/Time Functions

Date/Time functions include the following:

- Today
- **Year**
- **Month**
- **Day**
- **Month Name**
- **Date Difference**
- **Add to Date**

With some options, INFocus will indicate and prompt the user for a field selection. It will only bring up date and time fields so that the user cannot attempt a calculation for an incorrect field type. For example, if **Date Difference** is selected, the user will be asked for two date fields to compare, not two numeric fields.

Once the fields are selected in **First Date** and **Second Date**, the formula will be generated as shown below.
Users may then give a name to the new calculated field and save the field creation by clicking **Save**.

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**Text Functions**

*Text* functions include **Concatenate**, **Length**, **Left**, **Right**, **Middle**, **Type**, **Uppercase** or **Lowercase**. Just as with the *Date* functions, it will prompt the user for field(s) selections and will not allow the wrong field type to be selected.
Once the fields are selected, the formula will be generated in the *Definition* box.

Users may give a name to the new calculated field and save the field creation by clicking **Save**.

**Math Functions**

*Math* functions include **Absolute**, **Power** and **Square Root**. Just as with the date functions, the user will be prompted for field(s) selections and the system will not allow the wrong field type to be selected.
Once the fields are selected, the formula will be generated in the Definition box.

Users may give a name to the new calculated field and save the field creation by clicking Save. Users may also type directly into the Definition box if desired.

**Testing & Previewing Calculated Column(s)**

When the user clicks Test, the following screen is displayed, showing a subset example of how the calculated data will show.

![Testing & Previewing Calculated Column(s)](image)

**Statistical Columns**

Statistical Columns give users the ability to create new columns for the report based on a particular statistic from data in other columns. The following types are available: Rank, Reverse Rank, Percentile, Running Total and Difference from Previous.

- The user is able to name to column.
- The column must be saved in order to be used in the report.
- A statistical column may be added for a data field in the tables or a calculated column.
- **Rank**: Ranks data from the lowest value to the highest value.
- **Reverse Rank**: Ranks data from the highest value to the lowest value.
- **Percentile**: Classifies data based on a percentage of the value distribution.
- **Running Total**: Maintains a current total of values provided in the specified column.
- **Difference from Previous**: Displays the difference from the current value to the previous value.
Sort
The Sort tab allows the data being returned to have a default sort order. This will determine the initial display order of the data for tabular reports and the initial population of crosstab reports. The sort order may be overridden when the report is enabled if that option is available. The sort order must be set column by column.

- Click **Add a Column** to set a sort column(s).

- Select the field from the drop-list.
- Select **Direction** (Ascending or Descending).

- Click the red **X** to delete this column from the sort order.
• Additional columns may be added by clicking **Add a Column**.

• When multiple columns are selected for the sort, the order on the screen determines the hierarchy of the sorts. This may be changed by dragging and dropping the selecting into different orders on the screen, using the select tool icon (2 rows of 4 dots each) at the beginning of each row.

![Sort Tab Example](image)

• At the bottom of the **Sort** tab there is a **Return first N rows** option. This may be set to limit the number of rows returned from the reporting database or the report. This feature allows the report to be built on large datasets more efficiently by restricting the number of rows returned during development and testing of the report design. After the report design is complete, the value may be removed to report from the full dataset.

• If **Preview Selected Data** is selected, the following screen will display.

![Preview Data Preview](image)

**Filter**

Data in the report may be filtered by various criteria. The filter may be set within the design or the developer of the report can give the user the ability to supply filter criteria when the report is executed using **ASK** parameters.
To add a filter, select **Add a Parameter** from the *Filter* tab.

The parameter details screen will display.

The parameter takes the form of an equation similar to: *Label is Compared to Value.*

- **Label** represents the column name, a field selected from the data source selected.
- **Compared** represents the operator for the equation. This include *Equal to, Not equal to, Less than, Greater than, Less than or equal to, Greater than or equal to, Starts with, Does not start with, Ends with, Does not end with, Contains, Does not contain, Is null, Is not null, Between, No between, In list, Not in list, In cascading list.* Some of these options are only valid for certain data types.
- **Value** represents the data threshold to compare it to. This may be a specific value, a range, or a partial value depending upon the section of operator.
The **Ask in Report** parameter will allow the user to determine the filter values to use.

The user is able to set a caption, if desired. The **Control Type** includes **Date**, **Box**, **DropDown**, **Text** and **List** (single-select or multi-select). This is dependent upon the type of value that is selected. For example, the **In List** value allows the list to be multi-select, but the **Equal to** values makes the single-select.

A default value/selection may also be selected. The hour glass control will show which data is available to be selected.

When adding an **Ask** parameter, the user may set it next to another parameter or on a new line.

The user has the ability to offer an **All** selection also.
If multiple filter parameters are added, the user has the ability to change the order of the filter. The directional pad gives the user the ability to create levels for each parameter. Users may control the order of evaluation for multiple parameters using the directional pad.

- The Up arrow shifts the parameter one position higher in the list
- The Down arrow shifts the parameter one position lower in the list
- The Right arrow indents the parameter one position right
- The Left arrow indents the parameter one position left.

As parameters are indented, this sets enclosing parameters to appear to indicate the order of evaluation.

**Adding Report Objects**

Each report object will bring a separate tab into the report configuration window. If a template was selected initially, some tabs will be present (depending upon the template selected).

Use the magnifying glass at the top right of the screen to preview the report at any time. The Live Preview at the bottom right of the screen, when selected, will automatically preview the report with each configuration change.
Creating/Modifying Report from the Insert Report Objects Screen

From the **Insert** menu, all report objects may be added to the report regardless of whether or not the user began from a template. As an object is selected, the appropriate tab with the needed settings is added to the screen. The user may select the icon with the report object to add or the user may drag the icon to the report preview window.

**Table**

*Table* allows the user to select the fields and the order of those fields that will be used in a table style report. Please see the previous section regarding template creation for the details to the **Table** tab.
Table Columns

Fields from the selected views/tables will show in the left column. The user may select (either individually or using multiple selection) and then using the arrow controls choose fields to list in the right column. Fields in the right column are the fields selected to show in the tabular report.

The Up and Down arrow controls on the right column allow the user to change the order of the fields in the columns. From the Column Configuration tab, the user can select a variety attributes for each column. The Show Minimum Attributes and Show All Attributes flag will display all or some of the attributes.
Initially, only the column, header and sortable columns are shown in the configuration grid. By clicking the **Show All Attributes** icon, the grid is expanded as shown above. The grid may be collapsed by clicking the **Show Minimum Attributes** icon.

Columns may be selected (or deselected) by clicking on the box adjacent to the column. All columns may be selected or deselected by clicking on the box in the upper left corner of the grid. Some of the following functions apply to the selected columns.

Columns may be rearranged by drag-and-drop methods using the handle on the left of the grid. Click on the drag handle, move the row to the target location and release the mouse. Columns may also be rearranged by selecting the row and then click either the ▲ or ▼ icon to move the row up or down. To move a group of columns, select the desired columns by enabling their respective boxes and then click either the ▲ or ▼ icon to move the rows up or down.

Columns may be removed from the display table by selecting the column(s) and clicking the X icon. There are 9 configurable options available in **Column Configuration**:

- **Header**: Determines the column header displayed when the report is rendered.
- **Linkable**: Toggles predefined hyperlinks for records in the column. Each record in the **Linkable** column contains a hyperlink to an address specified by the System Administrator. Make column records linkable from the report by placing a check in the corresponding **Linkable** box.
  
  Note: The **Linkable** column will only be shown if the System Administrator has configured at least one of the columns as hyperlink-capable.

- **Sortable**: Determines whether the column in the rendered report may be sorted by the end user. The **Sortable** box determines the column’s sort capability. Sort capability may be enabled or disabled for all columns by clicking on the box in the header of the **Sortable** column.

- **Summary**: Offers the ability to create table footers containing aggregates of values for each column of data. An unlimited number of aggregates may be created for each table column. The following aggregate functions are supported:
  - Sum
To manage summary values, click **Summary**. The following screen will display:

- Click **Add an Aggregate** on the *Aggregates* dialog.
- Type a name for the new value in the *Label* field.
- Choose an *Aggregate* function from the drop-down menu.
- Choose a *Format* from the drop-down menu.

**OPTIONAL:** If more than one aggregate has been specified, click the ▲or ▼icon to arrange the order in which the aggregate will appear in the column. Aggregates may also be rearranged by drag-and-drop methods using the ▲handle on the left of the grid. Mouse down on the drag handle, move the row to the target location and release the mouse.

Continue adding additional aggregates or click **OK** to add the summary value(s) and return to the *Column Configuration* interface.

Aggregates may be removed by selecting the aggregate and clicking the ✖ icon.
• **Format**: Provides data formatting options for values in each column. The following formatting options are supported:
  - (none)
  - General Number
  - Currency
  - Integer
  - Fixed
  - Standard
  - Percent
  - Scientific
  - 2 or 3-digit place holder
  - General Date
  - Long/Medium/Short Date
  - Long/Medium/Short Time
  - Yes/No
  - True/False
  - On/Off
  - HTML
  - Preserve line feed

• **Visualization**: Allows numeric fields to be displayed with a colored indicator. The following indicators are available:
  - (none)
  - Bar
  - Color Slider (background)
  - Color Slider (circle)
  - Color Slider (square)

Color indicators allow users to define their own thresholds for comparing a value at a particular row with all other values in that column. When enabling visualization on a particular column, a color slider appears in the column header for setting the threshold. The color spectrum is determined by how much the data values in the column deviate from the specified threshold. Choose to visualize each cell value as a colored shape - bar, circle or square - or shade the entire cell background. Additionally, the numeric data value may be displayed adjacent to the visualization. Following is an example of visualization.

To add a visualization affect, perform the following steps:
  - Click to add a visualization affect for a specific column. The *Visualization Options* dialog will be displayed.
Choose a style from the *Visualization Style* drop-down menu.

- Change the *Show Data Values* option as desired. Default setting is *Yes*.
- Choose an aggregate function from the drop-down menu.
- Click OK to add the summary value and return to the *Column Configuration* interface.

- **Width**: To change the width of the column (in pixels), simply type in the width within the box.
- **Alignment**: The Alignment option adjusts the position of values in columns (left, centered, right).
- **Style**: The Style option offers the ability to apply conditional formatting to a column's cell based upon a specific value. When the style icon is selected, the following screen will display.

Once **Add A Condition** is selected, the following screen will display:

- **Column** is the data field to search for to control the conditional formatting.
- **Operators** include *Equal to*, *Not equal to*, *Less than*, *Greater than*, *Less than or equal to*, *Greater than or equal to*, *Starts with*, *Does not start with*, *Ends with*, *Does not end with*, *Contains*, *Does not contain*, *Is null*, *Is not null*, *Between*, *No between*, *In list*, *Not in list*, *In cascading list*. Some of these options are only valid for certain data types.
- **Value** is the value to compare to. It may be a specific value or comparison to another data column. The hourglass icon can show the specific values in the data field to select from.
• **Style** includes bold, green, red, align text left, align text center, align text right, align image left, align image right, align image center, black text yellow background, white text green background.

• **Apply style to all columns** means to set the conditional formatting to the entire row. If this is not selected, only the column holding the data element will be conditionally formatted.

After clicking **OK**, the following will display.

![Conditional Styles](image-url)

Additional conditional formatting may be added.

**Grouping**

Grouping options allows the user to group the report in either a flat-table style or drill down style.
When the **Group Flat Table** option is selected and **Add Grouping Layer** is clicked the following screen is presented.

To see all attributes, select **Show All Attributes**.

Users may add an aggregate of *Sum, Average, Standard Deviation, Count, Count distinct, Maximum* and *Minimum*. 
If selecting a group-drill down, the following screen will display in addition to the filed selections:

**Header Information**

**Table Settings**

**Table Settings** allows the user to set a title, paging controls, number lists, and summary rows to a table report.
Cross Tab

**Crosstab** allows the user to set up a crosstab report which gives users the ability to display joint distributions of data from three separate columns. The results of the cross tabulation are displayed in table format. Every crosstab table consists of three columns. It is similar to a Microsoft Excel® pivot table.

<table>
<thead>
<tr>
<th>Column Type</th>
<th>Use in Crosstab Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Populate the first row of the table. Each new value encountered in the crosstab column produces a new column in the crosstab table.</td>
</tr>
<tr>
<td>Label</td>
<td>Populate the first column of the table.</td>
</tr>
<tr>
<td>Values</td>
<td>Populate the aggregate data. The aggregate values are a sum, count, standard deviation or average of the fields in the Value column.</td>
</tr>
</tbody>
</table>

Example:

![Crosstab Example](image)

When selected, two configuration tabs appear – **Crosstab Configuration** and **Crosstab Settings**.

**Crosstab Configuration** allows the user to set the Header, Label and Values columns. It also allows the user the flexibility regarding the aggregate to use for values (sum, average, standard deviation or count).
**Crosstab Settings**

Crosstab Settings allow the user to set a title, paging options, and numbering.

**Pie Chart**

The *Pie Chart* allows the user to set the attributes for the pie chart. The screen below shows all attributes.
Each area of the pie chart definition screen may be manipulated, but normally only a few parameters need to be set:

- **Title**
- **Label Column** (what is the label for the legend?)
- **Data column** (what is being counted, summarized, etc.)
- **Legend**
- **Animation** (if desired, required if that legend is off/unselected)

Other settings, such as colors, line width, etc. are also able to be selected. All measurements are in pixels.

If desired, place a check in the **Use Relevance Values** box to specify thresholds for data displayed in the chart. Enter a relevance value in the value field and select **Top N Rows** or **Percentage** as the scale. Use relevance values to filter data displayed in a chart.

For example, only the top 75% of data in the chart could be relevant. In this case, check the **Use Relevance Values** box, enter a value of 75 in the value field and click **Percentage**.
**Bar Chart**

*Bar Chart* allows the user to set the attributes for the bar chart. The screen below shows all attributes.

Each area of the bar chart definition screen may be manipulated, but normally only a few parameters need to be set:

- **Title**
- **Label Column** (what is the x-axis of the chart?)
- **Data column** (what is the y-axis of the chart?)
- **Crosstab filter**
- **Legend**
- **Trend line**
- **Animation** (if desired, required that the crosstab filter is off/unselected)
- **Data (Y-axis) scaling**

Other settings, such as colors, line width, etc. are also able to be selected. All measurements are in pixels.

If desired, place a check in the **Use Relevance Values** box to specify thresholds for data displayed in the chart. Enter a relevance value in the value field and select **Top N Rows** or **Percentage** as the scale. Use relevance values to filter data displayed in a chart.

For example, only the top 75% of data in the chart could be relevant. In this case, check the **Use Relevance Values** box, enter a value of 75 in the value field and click **Percentage**.

**Line Chart**

**Line Chart** allows the user to set the attributes for the line chart. The screen below shows all attributes.
Each area of the line chart definition screen may be manipulated, but normally only a few parameters need to be set:

- **Title**
- **Chart type** (line, spline, area)
- **Label column** (what is the x-axis of the chart?)
- **Data column** (what is the y-axis of the chart?)
- **Crosstab filter**
- **Legend**
- **Trend line**
- **Animation** (if desired, required that the crosstab filter is off/unselected)
- **Data (Y-axis) scaling**

Other settings, such as colors, line width, etc. are also able to be selected. All measurements are in pixels.

If desired, place a check in the **Use Relevance Values** box to specify thresholds for data displayed in the chart. Enter a relevance value in the value field and select **Top N Rows** or **Percentage** as the scale. Use relevance values to filter data displayed in a chart.

For example, only the top 75% of data in the chart could be relevant. In this case, check the **Use Relevance Values** box, enter a value of 75 in the value field and click **Percentage**.
Scatter Chart
Scatter Chart allows the user to set the attributes for the scatter chart. The screen below shows all attributes.

Each area of the scatter chart definition screen may be manipulated, but normally only a few parameters need to be set:

- **Title**
- **Label column** (what is the x-axis of the chart?)
- **Data column** (what is the y-axis of the chart?)
- **Legend**
- **Trend line**
- **Animation** (if desired, required that the crosstab filter is off/unselected)
- **Data (X-axis) scaling**
- **Data (Y-axis) scaling**

Other settings, such as colors, line width, etc. are also able to be selected. All measurements are in pixels.

**IDV (Interactive Data Viewer)**

The **IDV Chart** tab allows the setting for the **Interactive Data Viewer** chart to be defined.

Each area of the IDV chart definition screen may be manipulated, but normally only a few parameters need to be set:

- **Title**
- **Label column** (what is the x-axis of the chart?)
- **Data column** (what is the y-axis of the chart?)
- **Crosstab column**
- **Style**

Other settings, such as colors, line width, etc. are also able to be selected. All measurements are in pixels.
Heat Map

The Heat Map Chart tab allows the setting for the heat map chart to be defined. This chart allows for one data element to control the box size and another data element to control the box color.

The heat map has the following parameters:

- **Label column**
- **Cell Color Column**
- **Cell size column**
- **Color slider**
Label

The **Label** tab allows the user to add a text box, defining its contents, type and style. It offers the ability to add custom messages and text in the report. An unlimited number of labels above or below other reporting components may be added. Use labels to add text to the report that would otherwise be too long for a table or chart caption.

Label type is either **Simple** (always centers the text) or **Full Width** (uses full available width of the report).

**Style** is a standard style drop-list options, including bold, green, red, align text left, align text center, align text right, align image left, align image right, align image center, black text yellow background, white text green background.
**Image**

Image allows the user to embed an image on the report. This is typically used for items such as school or district logos.

The image may be a *File* or *URL*.

**Style** is a standard drop-list, including bold, green, red, align text left, align text center, align text right, align image left, align image right, align image center, black text yellow background, white text green background.

**Exports**

Export allows the user to add export options to the report.

Export options are not required on any report design. They may include:

- **Searchable report** (non-paged style)
• **Printable paging**
• **Export to Excel**
• **Export to Word**
• **Export to PDF**
• **Export to CSV**
• **Export to XML**
• **Send report by email** (selecting format)

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**Settings**

The **Settings** menu bar allows the user to set page defaults and styles for the HTML view of the report.

---

**Paging**

Paging allows the user to set the paper size, orientation, and page number choices. The default settings are letter, portrait, and page numbers are displayed.

---

**Style**

Style allows the user to choose from a set of pre-defined visual styles to the HTML view of the report. This sets color, shading, etc. The default style is *Light*. 

---
As the user selects a style, the preview window will display a sample.

File

The **File** menu band allows the user to create a new report, open an existing report, save a report, save a report as a different name, and preview a report.

- *New* will start the wizard for creating a new report.
- *Open* will allows the user to open a report for modification.
- **Save** will allow the user to save/save as a report, noting the destination folder to place the report in.

- **Preview** will preview the report, running the report for the user.

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**Creation of Dashboards**

A dashboard is a series of reports, formatted into ‘PANELS’ that will run simultaneously when the dashboard is selected.

When the user selects to add a dashboard, the following screen is presented:
When the user selects **Add a Panel**, the following screen will display:

![Panel Settings](image)

Dashboards are created by adding and configuring different panels. A panel is built with one of the following content types:

- **Pre-defined Reports**: Canned reports that provide a quick view of a user's most:
  - Frequently Viewed Reports
  - Recently View Reports
- **Favorites**: A user-specified list of reports contained within a folder accessible from the My Personal Reports page.
- **URL**: Any valid URL to which the user has access.
- **Reports**: A user-specified report accessible from the My Personal Reports or Shared Reports pages.

Panels are organized into columns in the dashboard. A column may contain none to many panels but as a minimum, a dashboard must contain at least one panel to be saved.

An unlimited number of panels may be added to a dashboard. The panels may be configured to appear in the dashboard layout using panel settings and the panel drag feature controls provided.

- Click the **Add** button to view the **Panel Settings** panel.
- Type a **Name** and **Description** for the panel in the fields provided.
- Change the **Initial Column** value based on where the panel should appear in the dashboard. The default value is 1.
- Change the **Initial Display** setting based on:
  - Yes - display the panel at initial viewing of the dashboard (default).
  - No - do not display the panel at initial viewing of the dashboard.

  **Note:** If **Initial Display** is set to No, then the user has the option to add the panel via the **Change Dashboard** option within the dashboard viewer.

- Adjust the panel **Height**. Default value is 300 pixels. The value range of possible settings is 10 to 5000 pixels.
- Select the **Panel Content** type (default is Report).
- Specify the report, folder or URL in the field provided.
- If **Pre-defined reports**, then select one of the listed reports and click **OK**.
- If **Favorites**, then locate and select a **Personal Reports** folder and click **OK**.
• If URL, then specify a URL address. Click Test URL to confirm that the URL may be viewed.
• If Reports, then locate and select a report located in the Personal Reports or Shared Reports.
• Click Save Panel and return to the Dashboard Builder interface.
• If the dashboard had not been previously saved, then type a name for the dashboard in the field provided.
• Rearrange panels as necessary with the up/down arrows
• Click Save to store the dashboard.

Modify a Dashboard Panel
• Hover the mouse over the icon for the report and select Modify Dashboard Panel from the dropdown list.
• Modify the panel as desired.
• Click Save Panel and return to the Dashboard Builder interface.
• If the dashboard had not been previously saved, then type a name for the dashboard in the field provided.
• Click Save to store the dashboard definition.

Delete One or More Dashboard Panels
• Select the desired panel(s) by enabling its respective box(es).
• Click the Delete button.
• Click OK to confirm the removal.
• If the dashboard had not been previously saved, then type a name for the dashboard in the field provided.
• Click Save to store the dashboard definition.

The Dashboard Settings panel offers the ability to configure a dashboard's general appearance and provide an optional description. A panel's appearance is controlled by the selected dashboard style, which gives the dashboard a specific "look and feel". The available dashboard styles are:

• (None)
• Classic
• Gray
• Harmony
- LemonLime
- Light
- Mocha
- Nature
- Ocean
- Professional
- RedWine
- Technical
- Tropical
E-mailing Reports

Send PDF Report by Email opens a form where the e-mail may be composed and recipients specified.

Manually enter one or more e-mail recipients or click the respective icon to view and select from a list of application users. Specify a subject and message. When done, click Send to send the e-mail with a PDF version of the report attached. Click Cancel to cancel this export action.

- The From e-mail address is defaulted to the e-mail address specified in the logged in user's Profile.
- All fields except Cc and Bcc are required.

Note: The ability to schedule a report to be e-mailed automatically will be added in a future release.