Enterprise Reporting Preview Release

PowerSchool
Student Information System
Released December 2015

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This edition applies to Release 9.2 of the [product name] software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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PowerSchool Enterprise Reporting Preview

PowerSchool Enterprise Reporting is a preview release in PowerSchool 9.2. This new feature is delivered as a plugin that provides access to Oracle Application Express (APEX) Interactive Reports. The Enterprise Reporting plugin is installed by default with PowerSchool 9.2, and may be activated by an administrator with access to the Plugin Management Dashboard. Additional users must be given specific permission to access the Enterprise Reporting content through the plugin. Users who have been given access to the Enterprise Reporting content will be able to sort, filter, and manipulate the data defined in the prebuilt and customized reports.

The Enterprise Reporting preview gives you the opportunity to start using all of the robust features found in APEX so you can start to use all of the included features and provide feedback for a more in-depth integration in the future. The plugin creates custom pages within PowerSchool to allow access to a group of prebuilt APEX interactive reports. In addition, administrative users will be able to access the native APEX application outside of PowerSchool in order to create and share more interactive reports within PowerSchool.

Enabling the Enterprise Reporting Plugin

The Enterprise Reporting plugin is automatically installed with PowerSchool 9.2. You must enable the plugin in order to access Enterprise Reporting. For information on managing the plugin, see the Plugin Management User Guide, available on PowerSource.

The Enterprise Reporting plugin is dependent on page customizations. You must enable page customizations on the Customizations page. For more information, see the Customizations section of the Plugin Management User Guide.

When the plugin is enabled, the following occurs:

- An Enterprise Reporting link appears on the PowerSchool main menu under Applications.
- You are added as the initial Enterprise Reporting user and will be able to access the content and add more users.
- An APEX Setup link appears on the System menu when signed in at the District. This allows you to create user access accounts for the APEX Application Builder.

How to Create an Enterprise Reporting User Account

Assign user accounts to provide access to Enterprise Reporting.

When you create an Enterprise Reporting user account, the PowerSchool security settings for the user are applied so the user can only view information they are assigned to view in PowerSchool.

2. On the Enterprise Reporting page main menu, select Setup, and then choose Users. The Users page appears.
3. Click Create. The Users Maintenance page appears.
4. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>Enter the name for the user account (that user's PowerSchool username).</td>
</tr>
<tr>
<td>User Type</td>
<td>Select the type from the pop-up menu: Administrator and System provide access to the Setup menu in Enterprise Reporting, and allows the user to create pages and user accounts.</td>
</tr>
<tr>
<td>Email</td>
<td>Enter the email address for this user account.</td>
</tr>
<tr>
<td>Save Public Reports</td>
<td>If you want this user to save reports that are available to all Enterprise Reporting users, select Yes.</td>
</tr>
</tbody>
</table>

5. Click Create. The Users page appears and a confirmation message displays.

How to Create Your APEX Application Builder User Account

Set a user account for yourself in order to access APEX Application Builder and add other user accounts. For security reasons, you can only access the Create APEX User page one time. Once you create an APEX account for yourself, you can add other user accounts in APEX. For more information, see the Oracle Application Express Documentation, available via the APEX Help Center.

Note: It is recommended that you set an APEX user account for yourself immediately, as the Create APEX User page is designed to be used only one time to set up the administrator’s account. This page is accessible to anyone with administrator security privileges in PowerSchool.

IMPORTANT: Users must be given specific permission to access the APEX Application Builder from a page accessible from the System menu, which should be secured after installation. Users that are given permission to access the APEX Application Builder will have full database privileges in this preview release. Therefore, only a limited number of highly trusted users should be given access to the APEX Application Builder.

1. Sign in at the District Office.
2. On the start page, choose System under Setup in the main menu. The System Administrator page appears.
4. Use the following table to enter information in the fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter the first name for the account.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter the last name for the account.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>User Name</td>
<td>Enter a user name for the account.</td>
</tr>
<tr>
<td>Password</td>
<td>Enter a password for the account.</td>
</tr>
<tr>
<td></td>
<td>The password you enter here complies with the password rules applied to your PowerSchool environment. For more information, see Password Rules Management in the Security User Guide for PowerSchool 9.x, available on PowerSource.</td>
</tr>
<tr>
<td>Confirm Password</td>
<td>Enter the password again to confirm.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter the email address for the account.</td>
</tr>
<tr>
<td>Copy SMTP Settings</td>
<td>This checkbox is selected by default and will copy the PowerSchool SMTP settings to APEX.</td>
</tr>
<tr>
<td>to APEX</td>
<td></td>
</tr>
</tbody>
</table>

5. Click **Submit**.

**How to Access the APEX Application Builder**

To access the APEX Application Builder you must navigate to a specific URL outside of PowerSchool. Enter the address for your PowerSchool server but instead of /admin use /ords (for example, http://[server address]/ords). Enter PS in the Workspace field, and your APEX username and password to access the APEX Application Builder, as well as to add more users.

For more information, see the *Oracle Application Express Documentation*, available via the APEX Help Center.
Work With Enterprise Reporting

Enterprise Reporting provides the following five reports when enabled:

- Student Demographic
- Student Grades
- Student Attendance
- Student Incident
- Student Test

Users who have been granted access to the Application Builder in APEX can publish additional reports to the PowerSchool Enterprise Reporting plugin.

How to Customize Interactive Reports

Customize the layout on any report to view specific results.

2. On the Enterprise Reporting page main menu, select Setup, and then choose Reports. The available reports appear in the main menu. Select a report, and the interactive filters appear on the page.
3. Use the following table to make selections from the filters:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Current Selection</td>
<td>Set the current report data. Choose <strong>Set Current Selection</strong> to make the students from the applied filter your current student selection. Choose <strong>Add to Selection</strong> to add students to your current selection. This selection is now available in other areas of PowerSchool.</td>
</tr>
<tr>
<td>Search</td>
<td>Enter search criteria in the search box. Click the arrow next to the search icon to narrow your search to specific columns. Choose <strong>All Columns</strong> to search all columns. Click <strong>Go</strong> to submit the search.</td>
</tr>
<tr>
<td>Report List</td>
<td>The Reports list displays alternate default and saved private or public reports. Choose a report from the pop-up menu.</td>
</tr>
<tr>
<td>Rows</td>
<td>Select the number of rows to display on the page from the pop-up menu.</td>
</tr>
</tbody>
</table>
### Field | Description
--- | ---
Actions | Select an option from the pop-up menu to customize the report:
  * **Select Columns** - specify which columns to display and in what order.
  * **Filter** – opens the Filter dialog, where you can specify filter options.
  * **Rows Per Page** – select the number of rows to display on each page of the current report.
  * **Format** – select a format option from the submenu.
  * **Flashback** - select to view the data as it existed at a previous point in time.
  * **Save Report** – select to save the report.
  * **Reset** – select to reset the report back to the default settings.
  * **Help** – select to open the Oracle online help for interactive reports.
  * **Download** – select to download a report. Available download formats depend upon your installation and report definition.
  * **Subscription** – select to send an interactive report by email.

### 4. To filter data on the report:
   a. Select the checkbox next to the filter name. Use the arrow to the left of the filter name to view or hide filter details.
   b. To edit a filter, click on the filter name.
   c. To remove a filter, click the x next to the filter name.