PowerSchool | Customer Education

PowerSchool Special Programs: Report Writing, Document Enhancement, and Decision Making Part 1

Using PowerSchool Special Programs, monitoring your data has never been easier. The report writing tool is designed for all users regardless of their technical skills and comfort levels. Look at how to create list and multi-dimensional reports with ease using the embedded report writing tool.

This course presents how to:

- Work with existing reports
- Create a list report
- Create a multi-dimensional report
- Define selection criteria
- Use the formula builder
- Customize columns, sorting, and filtering
- Manage security and publish reports

Accessing Special Programs

Special Programs is integrated with single sign-on from PowerSchool SIS and Unified Classroom. Across the top of Special Programs, you will see several menus to access different features in Special Programs, including the Reporting menu.

Signing In from PowerSchool SIS

There are two ways a user can access Special Programs through PowerSchool SIS:

Teachers can access Special Programs from within PowerSchool SIS:

1. Sign in to PowerTeacher
2. Navigate to **PowerTeacher Pro**
3. On the menu bar, click **Apps,** then select **Special Programs Home**

Administrators and staff can navigate to My Home Page in Special Programs from within PowerSchool SIS:

1. In the dark blue border at the top of the page, click the Applications icon that looks like a box with an arrow to open the Applications drawer, then select **Special Programs Home**

Signing In from Unified Classroom

There are two ways a user can access Special Programs through Unified Classroom:

Teachers can access a student's Special Programs documents from within Unified Classroom:

PowerSchool Special Programs: Report Writing, Document Enhancement, and Decision Making Part 1

1. Navigate to Students
2. Select a student and click **View Detail**
3. At the top of the page, click **Quick Links**
4. Under Special Programs, select **Student Documents**

Administrators, staff, and teachers can navigate to My Home Page in Special Programs from within Unified Classroom:

1. From the navigation menu, select **Quick Links**
2. Under Special Programs, select **Special Programs Home**

Activity 1 – Sign In to Special Programs

Sign in and navigate to Special Programs.

1. Sign in using the server and sign-in credentials provided by your trainer
2. Navigate to Special Programs as described above

   Special Programs My Home Page opens in a new browser tab.

Click the PowerSchool Special Programs logo at the top-left corner to return to My Home Page

My Home Page

My Home Page is your Special Programs dashboard. You can adjust the My Home Page panels by collapsing, expanding, and moving them around. In the header, the PowerSchool Special Programs logo is a link to My Home Page. Whenever you see this icon, click it to return to My Home Page. Being able to return to My Home Page from almost anywhere in Special Programs comes in handy when you want to start a new task.

Also contained within the header section is the Special Programs Help menu. Click the question mark icon to access the Help menu. Next to the question mark icon is an icon with the current user initials. Click this icon to access a menu of user-related options, including the sign out link. Always sign out of Special Programs when you leave your workstation or are done using the program.

The specific options and panels you have in My Home Page are determined by the security group your user account belongs to and the permissions granted to the security group. Once you leave My Home Page for another page, the page names appear in the navigation toolbar. These linked page names are called the navigation path, or breadcrumbs. Click a link in the navigation path to return to that page.

PowerSchool Special Programs: Report Writing, Document Enhancement, and Decision Making Part 1

Reports

Special Programs is designed to create two different types of reports. The platform offers List Reports and Multi-Dimensional Reports. These reports can be created from scratch, or the user can access a variety of pre-made reports that are created based on system needs.

List reports are a collection of rows (records) and columns (data types) in a table format. A row represents information for a specific record. Users can create reports to display certain records based on the criteria of the report and then add columns to show more information for each record.

A multi-dimensional report is useful for a summary of information, or a view of aggregate data across more than one data point, like a crosstab report or pivot table. For the dimension (data point or field) selected for columns, a column is included on the report for each value in that dimension. For the dimension selected for the rows, a row is included for each value in that dimension. Aggregate data such as count or sum appear in the intersecting cells where each row and column meet. A multi-dimensional report is a great tool when creating presentations because you can chart data and also include totals for a data point. With multi-dimensional reports, if any part of the information included in the report doesn’t exist in a record, the report will not include that record. It is very important that the data used for multi-dimensional reports is complete

Extended Features of Multi-Dimensional Reports

You can use features to drill down into the underlying data behind the summary data that appears on the report. Multi-dimensional reports can also be viewed as graphs that make it easier to visually compare data. Graphs can be in 2D or 3D view, and in color or black and white. These features make multi-dimensional reports useful for handouts or slide decks in meetings and presentations to help people make data-driven decisions.

Viewing Pre-Made Reports

Each model of Special Programs has some pre-built reports that can be accessed and viewed. Reports are grouped in categories with reports of a similar type. In addition to viewing reports, users can manipulate the results of the report by filtering the information without having to edit the report or change the criteria of the report.

To filter a report, click a column heading to access

the filter options for that column. Depending on the type of data in the column, you may enter a value or select a value from a list to return all rows that match that value in the column.

This feature can be used to answer questions like: What staffing do I need to be able to provide given the exceptionalities of my students?

Activity 2 – View and Filter Existing Reports

Access the necessary reports to answer the following questions:

- What minority group has the largest number of students eligible for services?
- For the exceptionality of Other Health Impairment, what ethnic subgroup has the most students?
- What disabilities have only been identified for one gender?

3. From the Special Programs top menu, click **Reporting** then **Standard Reports**
4. Select the category **Public Student Reports** and choose the **Eligibility by Ethnicity** report
5. To see as a chart, using the Options Drop-Down select Show as Chart. Manipulate data to see it as a 3D chart and change the bars to vertical. Interpret the data to determine answers to questions 1 and 2.
6. Using the breadcrumb trail at the top left, click Standard Reports and select the Eligibility by Gender Report.
7. By manipulating the report, find the information necessary to answer question 3.

Subscribing to Reports

Subscribing to a report puts a direct link to the report on the user's My Home Page. This feature is especially helpful for reports used often. For reports used to monitor compliance, highlighting the report name and showing a row count on the home page are also very useful. When subscribing to a report, a user may elect to set up a notification so that an email is sent to the user. A valid email address in the user's staff profile is required.

Publishing Reports

You can publish reports to appear on the My Home Page for users in a particular security group. This is helpful for reports that assist in monitoring student information for regulatory compliance. The reports can indicate data issues that users need to know about right away.

Activity 3 – Subscribe to a Report with Highlighting and Row Count

Subscribe to the report from the view screen so that your home page shows the report

3. Click the Subscribe button in the far left hand corner
1. Change the setting to Yes by clicking in the circle to subscribe to the report, the page will expand and give you the option to show the entire report, or just a link to the report on the home page. Select Show Link On Home Page
2. Select Set Options
3. Click the Powerschool P in the top left of the page and under the reports panel look to see if the link to your report is there.

   Notice the report is highlighted with the color you selected and the row count appears with a time stamp for when the report was last refreshed.

OR

Activity 3 – Publish Your Report to Users in a Security Group

Publish this report so that the users in the Principals/Counselors/Staff security group so that the report will appear on My Home Page for each user.

1. From the blue text options above your report, click **Publish**
2. To show your report on My Home Page for users in the Principals/Counselors/Staff security group, for this Security Group row, check **Location-wide**
3. Select **Save and Exit**
4. Return to My Home Page

Creating a List Report

Each report must have a unique name. A report description is optional but it can be useful to explain the criteria set on the report if it is not clear from the report name. You also need to choose a category for your report. Then you will choose what type of information you want to use to create the report, such as Students or Staff. Next, determine which records should appear on the report by creating selection criteria. Shortcuts are available to make it easier to select a population of students and/or to select student enrollment status. Reports can be created from data in profiles or document templates, with various field types.

Reports can be either public or private. You can set security on public reports so certain groups of users can access the report. The data that appears for a user in a public report is filtered automatically based on the user's security. Private reports are put under the user's list of reports and can be viewed by others only if the user shares the report.

This type of reporting can answer questions like: Which students are currently identified as gifted?

Activity 4 – Create a List Report

Create a list report by giving your report a name, a brief description, and a new category. Create a report to answer the question: Which students are currently enrolled in Special Education?

1. Go to Reporting
2. Click **Standard Reports**
3. Below the Standard Reports page name, select **New List Report**
4. For Report Name, enter **`LastNameFirstInitial_Basic List Report`**
5. For Ownership/Category, select **Public Report** then open the Optional Category menu and select the name of your trainer.
6. For Type of Information, use the default value of **Students**
7. We will discuss selection formulas later in this course so move down the page to the Selection Options and check **Include Only 'IEP' Students** to include only Special Education students on your report

8. Include only students who are currently enrolled in Special Education by checking **Include Only 'Not Exited' Students**
9. Click **Accept**
10. At the top of the page next to the report name, click **Finish Editing Report**

    Your report displays all students currently enrolled in Special Education.

Selection Criteria

Add selection criteria to your report to filter the data for only records that meet your criteria. Unless you define selection criteria, your report will include all data of the selected type of information. You can define criteria from profile sections, the most current information, or from current or historical documents. When you create a report, any field in the selection criteria will appear as a column on the report. Then you can edit the report to add or remove columns.

Quick Formula

Use the Quick Formula feature to help you quickly define search criteria for your report. If the fields you need are available on the Quick Formula form, Quick Formula is an easy way to access the information.

This functionality can be used to answer questions like: How many 10^{th} grade girls are identified as part of an exceptional education program?

Activity 5 – Add Selection Criteria Using Quick Formula

Create a report by adding selection criteria using the Quick Formula feature to answer the question:

How many 10^{th} grade boys are identified as exceptional?

1. Go to Reporting
2. Click **Standard Reports**
3. Below the Standard Reports page name, select **New List Report**
4. For Report Name, enter **`LastNameFirstInitial_Quick Formula Report`**
5. For Ownership/Category, select **Public Report** then open the Optional Category menu and select the name of your trainer.
6. For Type of Information, use the default value of **Students**
7. Use the Quick Formula form to define the selection criteria.
8. Under the Student Quick Search, open the Grade menu and select Tenth Grade
9. Under Student Quick Search, open the Gender menu and select **Male**
10. Under the formula box at the top of the form, click **Update Formula from Form** and notice that Grade = G10 AND Gender = Male appears in the formula box

11. To close the Quick Formula window, click **Update and Accept Formula**

    On the Selection Formula for Report page, the selection criteria Grade = G10 AND Gender = Male appears in the Report Selection Formula box.

12. At the bottom of the page, click **Accept**
13. At the top of the page, to the right of the page name, click **Finish Editing Report**

    Your report now shows data for all 10th grade male students currently enrolled in an Exceptional Education Program. Notice the number of records included in the report.

Adding Columns

When you have completed setting up the selection criteria for a report, you may want to add more columns of data to display more information. You can add as many columns as you like to a report, but keep in mind how user-friendly the report will be when viewed or printed.

Use this feature to answer questions like: How many 10th grade girls are identified as part of an exceptional education program AND how many of them have an annual review date?

Activity 6 – Adding Columns

Modify your report by adding a column in order to answer the question:

How many 10th grade boys are identified as part of an exceptional education program AND how many of them have an annual review date?

1. From the options at the top of the report, click **Edit Report**

   Notice the icons above each column on the report to add, edit, or delete columns.

2. To add a column to the end, click the **+** on the right side of the Grade column heading
3. At the top of the List Report Column Properties window, click the blue link **Select Field**
4. Open the Filter by Section menu and select **Special Education Information**
5. Under Compliance Timelines, click the blue link **IEPAnnualReviewDueDate**
6. For Column Title, click the box to see the column heading suggestion
7. Change the suggested Column Title to **`IEP Due Date`** then click **Accept**
8. Finish Editing Report

Formula Builder

Use the Formula Builder feature to create search criteria using any field in a profile or document, based on the option selected from the Type of Information menu when the report was created.

For example, use the Formula Builder to select records to appear on a report using AND/OR, or All/Any statements, which are described below:

- If you select **All**, the AND operator will be used between the conditions in the formula. Both criteria will be reviewed and only records that meet both criteria will appear on the report.
- If you select **Any**, the OR operator will be used between the conditions in the formula. Both criteria will be reviewed and any records that meet either criteria will return on the report

See the list below for some of the more common evaluation options available in the Formula Builder. Not all options are available for all fields, depending on the data type of the field:

- = (equal to): Returns records that match the criteria
- <> (unequal to): Returns records that do not match the criteria
- IS NOT EMPTY: Returns records only if the field has any data
- IS EMPTY: Returns records if the field does not have data (null)
- > (greater than): Used for fields that can be calculated such as numbers and dates, returns records that have a value that is greater than the value in the criteria
- < (less than): Used for fields that can be calculated such as numbers and dates, returns records that have a value that is less than the value in the criteria
- >= (greater/equals): Returns records if the data is greater than a value or matches the value
- <= (lesser/equals): Returns records if the data is less than a value or matches the value
- LIKE: Like is useful for searching for data patterns or partial values in text/character fields when users may have entered similar but not exact values

  The % character can be used as a wild card indicating that any data is acceptable in the place of the % character.
- NOT LIKE: Similar to LIKE, returns records that do not include a value anywhere within the data in the field
- IN (is one of): Returns records with any of the values in a list
- NOT IN (is not one of): Returns records that do not include any of the values in a list

Use this functionality to answer questions like: How many students have an active IEP, what is their exceptionality, and when does their current IEP end?

Activity 7 – Update Your Report Using the Formula Builder

Use the Formula Builder to filter your report based on additional criteria to answer the question:

How many students have an active IEP, when is their Reevaluation Date, and what is their exceptionality?

9. Go to Reporting
10. Click **Standard Reports**
11. Below the Standard Reports page name, select **New List Report**
12. For Report Name, enter **`LastNameFirstInitial_Formula Builder Report`**
13. For Ownership/Category, select **Public Report** then open the Optional Category menu and select the name of your trainer.
14. For Type of Information, use the default value of **Students**
15. From the blue links at the top of the page, click **Formula Builder**
16. Click **Select** to open the Select Field window
17. Open the Filter by Section menu and select **Special Education**
18. Under Special Education, select the blue link for Status
19. In the Formula Builder window, open the comparator menu for Status and select **=(equal to)**
20. Open the Value menu, the last field in the statement, and select **Active**
21. Click the Insert Condition button, which looks like a rectangle with a right facing arrow to add another condition window
22. Click **Select** to open the Select Field window
23. Open the Filter by Section menu and select **Special Education**
24. Under Compliance Timelines, select the blue link for ReevaluationDueDate
25. In the Formula Builder window, open the comparator menu for ReevaluationDueDate and select **IS NOT EMPTY**
26. Click the Insert Condition button, which looks like a rectangle with a right facing arrow to add another condition window
27. Click **Select** to open the Select Field window
28. Open the Filter by Section menu and select **Special Education**
29. Under Special Education, select the blue link for Exceptionality
30. In the Formula Builder window, open the comparator menu for Exceptionality and select **IS NOT EMPTY**
31. Click **Accept Formula** and notice that the Report Selection Formula shows the added filter with the AND operator
32. At the bottom of the page, click **Accept**
33. To exit the edit mode, at the top of the page, click **Finish Editing Report**

PowerSchool Special Programs: Report Writing, Document Enhancement, and Decision Making Part 1

Sorting and Page Breaks

Now that you have a few columns on your report, you may want to sort the report data in a specific way to make it easier to use. Student reports automatically sort the student list by Last Name then First Name. A report can be sorted by up to three columns in ascending and descending order.

You can also add page breaks to the report with a count of records for each group of records. A page break groups the records on the report by each value in the selected column and inserts a page break after each group of records.

Use this function to approach scenarios like this: You need to give each consult service provider for each exceptionality a list of dates for IEP Annual Review Meetings.

Activity 8 – Change the Sort Order and Add Page Breaks

To make sure your consult service providers are available for the student's Re Eval Meeting, modify your report to group the data by exceptionality and then sort the records by the Reevaluation Date. Apply page breaks so you can give service providers a list of dates they need to be available for a meeting.

1. Click **Edit Report**
2. Click the pencil icon next to Student Sort Value(s)
3. For Sort Value 1, click **Select Field**
4. In the Select Field window, under Special Education, select the blue link **Exceptionality**
5. For Sort Value 2, click **Select Field**
6. In the Select Field window, under Special Education, select the blue link **ReevaluationDueDate**
7. On the Sort Values page, under the Student Formula field for Sort Value 1, check **Page Break**
8. At the bottom of the page, click **Accept**
9. Click **Finish Editing Report**

Notice that the rows are grouped by exceptionality. For exceptionalities with multiple students listed, the rows are sorted by the earliest Reevaluation Due Date to the most delayed Reevaluation due date.

Changing Report Properties

Use Report Properties to change report settings to provide additional functionality or improve performance. Some of the report properties you can control include:

- Renaming the report or editing the description
- Moving the report to another category

- Determining when to refresh the report data and whether or not to allow a manual refresh
- Choosing output options, such as highlighting the report name in report menus
- Choosing editing control options, such as allowing private copies of the report
- Viewing a report with dates in a calendar view

For a report with dates, you can view the data in a calendar view by modifying the report output properties. The fields that appear on the calendar can also be adjusted. You can set the default view of the report to either the list view or the calendar view, then report users can toggle between the two views.

This feature allows you to view date data so you can modify the report properties so that you can view IEP Annual Review Due Dates on a calendar instead of a list.

Activity 9 – View Report Data in Calendar View

Modify your report properties so that you can see your ReEvaluation dates displayed on a calendar.

1. Click **Edit Report**
2. From the blue text options below the page name, select **Report Properties**
3. On the Report Properties page, for Output Options, check **Allow Display Report as Calendar**, then check **Default to Calendar View**
4. At the bottom of the page, click **Accept**

   Notice the report still appears in list view when the report is in edit view.
5. Select **Finish Editing Report**

   Now the report appears in calendar view.
6. To toggle back to the list view of the report, open the Show As menu and select **Data**
7. At the top of the page, click **Refresh**

   Notice that the report view reverted to the default calendar view.

Creating a Multi-Dimensional Report

To create a multi-dimensional report, the process is very similar to creating a list report in that you need to determine the selection criteria for which records to include in the report. The main difference between a list report and a multi-dimensional report is that instead of adding a column to show the data in that field for each record in a list report, you choose which aggregate data you want to show for the intersections between each value in the dimensions selected for the rows and columns. You can create a multi-dimensional report with up to three dimensions.

Use this feature to answer questions like: Which exceptionality spends the least amount of time in their Least Restrictive Environment?

PowerSchool Special Programs: Report Writing, Document Enhancement, and Decision Making Part 1

Activity 10 – Create a Multi-Dimensional Report

Build a multi-dimensional report to answer the questions:

- Which exceptionality has the most students that require transportation as a related service?
- Which exceptionality has the least number of students that require transportation as a related services?

1. From the top navigation menu of Special Programs, click **Reporting** and select **Standard Reports**
2. Select **New Multi-dimensional Report**
3. For Report Name, enter **`LastnameFirstInitial_Multi-Dimensional Report`**
4. For Ownership/Category, open the Optional Category menu and select the category with your trainer's name
5. For Type of Information, use the default option of **Students**
6. You will select all students currently enrolled in Special Education so skip Selection Criteria
7. For 1st Dimension – Rows, click **Select Field**
8. In the Select Field window, under Special Education, select the blue link **Transportation**
9. For 2nd Dimension – Columns, click **Select Field**
10. Open the Filter By Section menu and select **Special Education**
11. Under Special Education, select the blue link **Exceptionality**
12. At the bottom of the page, click **Accept**

    Notice the multi-dimensional report where each cell represents the number of students that do and do not require transportation related services broken down by their exceptionalities.
13. Above the report, under Dimensions, click the pencil icon next to Exceptionality to edit the dimension definition
14. Under the Dimension Value field, check the box for **`Use Descriptive Value Titles`** to show the description of the exceptionality instead of the code on the report
15. Click **Accept**
16. Click **Finish Editing Report**
17. By looking at the data as a table or as a chart, review the data in order to answer the questions

Key Points

- Viewing reports – View published reports and sort and filter report data

PowerSchool Special Programs: Report Writing, Document Enhancement, and Decision Making Part 1

- Creating list reports – Create a list report based on data from a profile or document
- Customizing reports – Add columns, sorting, and page breaks to reports
- Setting security and publishing reports – Use security groups to grant access to reports and publish reports to users' home pages
- Creating multi-dimensional reports – Show aggregate data for the cross-section of dimensions

