Enterprise Reporting Preview Release

PowerSchool
Student Information System

PowerSchool

Released December 2015

Document Owner: Documentation Services

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.

Contents

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.

1. On the start page, under Applications, choose **Enterprise Reporting**. The Enterprise Reporting: Preview Release page appears.
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:

Field	Description
User Name	Enter the name for the user account (that user's PowerSchool username).
User Type	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.
Email	Enter the email address for this user account.
Save Public Reports	If you want this user to save reports that are available to all Enterprise Reporting users, select **Yes**.

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.
3. Under Reports, click **APEX Setup**. The Create APEX User page appears.
4. Use the following table to enter information in the fields:

Field	Description
First Name	Enter the first name for the account.
Last Name	Enter the last name for the account.

Field	Description
User Name	Enter a user name for the account.
Password	Enter a password for the account. 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.
Confirm Password	Enter the password again to confirm.
Email Address	Enter the email address for the account.
Copy SMTP Settings to APEX	This checkbox is selected by default and will copy the PowerSchool SMTP settings to APEX.

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.

1. On the start page, under Applications, choose **Enterprise Reporting**. The Enterprise Reporting: Preview Release page appears.
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:

Field	Description
Set Current Selection	Set the current report data. Choose **Set Current Selection** to make the students from the applied filter your current student selection. Choose **Add to Selection** to add students to your current selection. This selection is now available in other areas of PowerSchool.
Search	Enter search criteria in the search box. Click the arrow next to the search icon to narrow your search to specific columns. Choose **All Columns** to search all columns. Click **Go** to submit the search.
Report List	The Reports list displays alternate default and saved private or public reports. Choose a report from the pop-up menu.
Rows	Select the number of rows to display on the page from the pop-up menu.

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.