# Helpful Reports and Processes

01/26/2025 10:43 am EST

Review a quick collection of helpful reports and processes below.

---

**Attendance Reports** | **Attendance Processes** | **Office Reports** | **Scheduling Reports** | **Scheduling Processes** | **Grade Reports**

---

## Attendance Reports and Processes

| Attendance Reports | | | |
|---|---|---|---|
| **Task** | **Purpose** | **Path** | **Steps** |
| **Print an Attendance Roster for a Substitute** | To print a blank report with a single day. | *Menu > Attendance Office > Reports > Sub Attendance Roster Report* | 1. Select **effective** date. <br><br> 2. Select **period**. <br><br> 3. Select **teacher(s)**. To select multiple teachers, hold down **control** while selecting the teacher. <br><br> 4. Select Display and Student Options to include. <br><br> 5. Add a comment if needed. <br><br> 6. Click **Generate Report**. |

| | | | |
|---|---|---|---|
| **Attendance Register Report** | To print a blank report with multiple days. | *Menu > Attendance Office > Reports > Attendance Register* | 1. Select **Course Section Attendance Register**.<br><br>2. Enter the **Start** and **End Date.**<br><br>3. Choose **Portrait** or **Landscape** orientation.<br><br>4. Select **teacher(s)**. To select multiple teachers hold down control while selecting the teacher.<br><br>5. Select **section(s)**. To select multiple sections hold down control while selecting the section.<br><br>6. Check to **Print copy for the Primary Teacher only**.<br><br>7. Select **sort** option.<br><br>8. **Generate Report**. |

| **Period Count Report** | This report counts attendance marks for students in the periods selected. | *Menu > Attendance Office > Reports > Period Count Report* | 1. Select the group of students to include.<br><br>2. Enter the **Enrollment Effective Date**.<br><br>3. Choose a **Report Type** of Total Count.<br><br>4. Enter a **Start Date**.<br><br>5. Enter an **End Date**.<br><br>6. Enter the **minimum** number of period absences that a student can have based on the criteria of the report you are generating in the Having at least box.<br><br>7. Enter the **maximum** number of period absences that a student can have based on the criteria of the report you are generating in the Having at most box.<br><br>8. Select the **Period GroupOptions**.<br><br>9. Select the **Sort Options**.<br><br>10. Select the **Attendance Mark Status(es)** based on the criteria of the report you are generating.<br><br>11. Select the **Attendance Excuse Status(es)** based on the criteria of the report you are generating.<br><br>12. Select the **Excuse Code(s)** based on the criteria of the report you are generating.<br><br>13. Choose the **Report Format**.<br><br>14. **Generate Report**. |
|---|---|---|---|

| Task | Purpose | Path | Steps |
|---|---|---|---|
| **Day Count Report** | This report determines the total number of days a student has been in attendance based on the minutes entered on the Whole Day Absence field on the Calendar Information tool.  Attendance counts are reported in whole-day values. | *Menu > Attendance Office > Reports > Day Count Report* | 1. Select the group of students to include and/or an Ad Hoc Filter.<br><br>2. Enter a **Start Date**.<br><br>3. Enter an **End Date**.<br><br>4. Enter the **minimum** number of daily absences that a student can have based on the criteria of the report you are generating in the days of Absences box.<br><br>5. Enter the **maximum** number of daily absences that a student can have based on the criteria of the report you are generating in the days of Absences box.<br><br>6. Choose the **DAILY APPROXIMATION** option under Calculation Options.<br><br>7. Choose the **Sort Option**.<br><br>8. Choose the **Report Format**.<br><br>9. **Generate Report**. |

## Attendance Processes

| Task | Purpose | Path | Steps |
|---|---|---|---|
| **Enter Attendance** | To enter attendance codes on groups of students (or individuals), based on individual class periods, whole days, a range of days, or a specific time period.<br><br>*Also useful for entering future absences.* | *Menu > Attendance Office > Attendance Entry Wizard* | 1. Select the correct **attendance date**.<br><br>2. Select a **mode**.<br><br>3. Mark appropriate student and/or period data.<br><br>4. Click **Save Attendance**. |
| **Daily Attendance Report** | To view attendance for a day. Results in a summary report of all students absent/tardy on the date chosen. | *Menu > Attendance Office > Daily Attendance Processing* | 1. Enter **Date**.<br><br>2. Choose **Summary Report**. |

| | | | |
|---|---|---|---|
| **Update an Individual Student's Attendance** | Allows you to modify attendance codes as you receive reasons for absences/tardies. | *Search Student > Student Information > General > Attendance* | 1. Select the student.<br><br>2. Navigate to **Attendance**.<br><br>3. Select **NEW**.<br><br>4. Change **date**.<br><br>5. Select **period**.<br><br>6. Select **code** (drop-down menu).<br><br>7. Add **comments** (optional) and click **Save**. |
| **Determine Which Teachers Have/Have Not Taken Attendance** | This tool monitors classroom attendance. | *Menu > Attendance Office > Classroom Monitor* | 1. Select **Date** and click **Refresh.**<br><br>2. Check "**Primary Teachers Only**" box.<br><br>Shows all teachers attendance: RED means attendance *has not* been taken; GREEN means attendance *has* been taken. |
| **Generate a Report of Who Created an Attendance Change on a Student: FOR SELECTED DAYS** | This report will extract attendance changes that have been made **for the selected attendance date** range during the selected modification time frame. Each modification to a student's section attendance is displayed in a separate row so please try to limit the length of the Attendance Date Range entered. The report can be printed in two formats CSV and HTML. | *Menu > Attendance Office > Reports > Attendance Change Tracking Report* | 1. Enter **Attendance Date Range**.<br><br>2. Select **Filter** Criteria.<br><br>3. Choose one of three filters: ("Include only attendance audit records that are tied to a course section") is the most common.<br><br>4. Select **Format** CSV or HTML (CSV will Export to an Excel File. HTML will look like an ad hoc query report. No pretty-formatted PDF is available for this).<br><br>5. **Generate Report**. |
| **Generate a Report of Who Created an Attendance Change on a Student: FOR A SECTION OR TEACHER** | This report will display changes to the student attendance in a **course section**. Enter the Attendance Date Range and the Modification Date Range. Each modification to a student's attendance record displays in a separate row in the report so please limit the length of the Attendance Date Range entered. Select the course sections of interest and the desired printing option. | *Menu > Attendance Office > Reports > Section Change Tracking Report* | 1. Enter **Attendance Date Range**.<br><br>2. Select **Filter** Criteria.<br><br>3. Select a **Teacher(s)** and/or **Section(s)**.<br><br>4. Choose to **Print by Teacher or Course**.<br>　○ **Generate Report**. (PDF is the only available option for this report.) |

## Office Reports

| Task | Purpose | Path | Steps |
|------|---------|------|-------|
| **Create Mailing Labels** | This report will generate mailing labels for the students who meet the search criteria.<br><br>*Only addresses marked as mailing addresses will be included.* | *Menu > Census > Reports > Mailing Labels* | This report generates mailing labels for the Students, Guardians, Teachers, and Staff for those individuals who meet the entered criteria.<br>• **Students**- Prints one label with student's name and one guardian name per household.<br>• **Guardians**- Prints one label with each person who is marked as a guardian per household.<br>• **Teachers**- Prints one label for each teacher who is in a household.<br>• **Staff**- Prints one label for each staff member who is in a household. |
| **ADM/ADA Attendance Detail Report** | Report shows membership and attendance information. | *Menu > Attendance Office > Reports > ADM and ADA Detail Report* | 1. Enter **Start** and **End Date**<br><br>2. Choose Ad Hoc filter if needed.<br><br>3. Select **Summary** or **Detail** type<br><br>4. Select **Daily Approximation** (provides whole day calculations)<br><br>5. Select the **Calendar** (hold control to select more than one)<br><br>6. **Generate Report** |

| Task | Purpose | Path | Steps |
|------|---------|------|-------|
| **Create an Emergency Contact/Non- Household Member Report** | This standard report includes a student's demographic information, household information, and non-household contact information. | *Menu > Census > Reports > Census Verification Report* | 1. Select the **Grade** of Student(s)<br><br>2. Select **Primary**, **Secondary** and **Non-Household**<br><br>3. Select any **other** boxes you'd like to include<br><br>4. **Generate Report** |
| **Enrollment Summary Report** | Report shows enrollments by school, grade, gender, and race/ethnicity. | *Menu > Student Information > Reports > Enrollment Summary Report* | 1. Enter the **Enrollment Effective Date**.<br><br>2. Select **All Schools** or **specific school(s)**. (All schools does not provide a district total).<br><br>3. Select the **State Race/Ethnicity** Values.<br><br>4. Choose **Original Format.**<br><br>5. Choose **P: Primary enrollment**.<br><br>6. Choose **report** format.<br><br>7. **Generate Report** |

# Scheduling Reports/Processes

| Scheduling Reports | | | |
|------|---------|------|-------|
| **Task** | **Purpose** | **Path** | **Steps** |

| Task | Purpose | Path | Steps |
|---|---|---|---|
| **Create a Class Roster** <br><br> **(May also be used for Field Trips and Census Cleanup)** | This report displays student rosters for each section for each teacher or course selected. The Effective Date is used to determine both the active Teachers assigned to the Course-Section and which students to include on the roster. The sections can be sorted by Course Name, Course Number or Period for each teacher selected. | *Menu > Scheduling & Courses > Reports > Section Rosters Report* | 1. Select **Term**. <br><br> 2. Select **Period Schedule**. <br><br> 3. Select **Period(s)**. <br><br> 4. Select **Teacher(s)**. <br><br> 5. Select **Date**. <br><br> 6. Choose **printing**, **output** and **extra options**. <br><br> 7. Select **Sorting** preference. <br><br> 8. **Generate Report**. <br><br> **For Field Trips**: Select the "Show Guardian Information" Box. This will print all of the contacts associated with either parent and/or guardian, for emergency purposes. |
| **Running a Staff History Report** | Run a report to see staff history. | *Menu > Scheduling & Courses > Reports > Staff History Report* | 1. Select **Course(s)**. <br><br> 2. Select **Primary Teachers** (and **Teacher** if you have any co-taught courses). <br><br> 3. Make any **other selections** needed and press **Generate Report**. |

## Scheduling Processes

| Task | Purpose | Path | Steps |
|---|---|---|---|

| | | | |
|---|---|---|---|
| **Add or Edit a Teacher/Section Record** | Where you can edit staff information related to sections and courses. | *Search > Course/Section > Enter appropriate code for course(s) > Select Search icon to search > Select correct course* | **Course Sections:**<br><br>**Edit** or **Add** *section as needed*<br>• Add/edit section number per PSU procedures.<br>• Click **period** boxes for each term the section occurs.<br>• If section attributes are set at the course level, only select in the section if different from the course (Post Secondary Institution, Instructional Provider, How Taken, Delivery Mode)<br>• Click **Create Section** at bottom of screen.<br><br>**Section Staff History:**<br>• Click the **New Primary Teacher**<br>• Select the new teacher<br>• Click **Save.** |
| **Running the Student Gap Scheduler** | This report shows which, if any, students are not assigned to a course. | *Menu > Scheduling & Courses > Load Schedules > Student Gap Scheduler* | 1. Pick a **grade** or **All Students**.<br><br>2. Select a **report** type (detail gives you the most helpful information).<br><br>3. Select which **period(s)** you would like to include.<br><br>4. Press **Find Students** or **Generate Report**. Find Students brings up the students who need classes/courses on the left side of the screen so you can edit right away. Generate Report brings up a PDF report of those same students. |

# Grade Reports

| Task | Purpose | Path | Steps |
|------|---------|------|-------|
| **Print Progress Report - Option 1** | Print a report of In-Progress Grades | *Menu >Grading & Standards > Reports > Grades Report* | 1. Pick a **Grade** or **Ad Hoc Filter**.<br><br>2. Check the appropriate grading term(s).<br><br>3. Select the teacher(s).<br><br>4. Choose a Group By option.<br><br>5. Check the Display Options needed (Set page break for each Student will produce one page per student).<br><br>6. Choose All Grades/Scores.<br><br>7. Generate Report. |

| Print Progress Report - Option 2 | Print a report of In-Progress Grades | *Menu >Grading & Standards > Reports > Report Card* | 1. If there is an existing report that you should print, choose the appropriate report and Skip to Step 3.<br><br>2. Otherwise, click on **Display Options** and follow the steps below:<br>   a. Name the Report.<br>   b. Choose the **Report Type**.<br>   c. Check **In-Progress Grades** under Display Grades, or **Posted Grades** if your district posts the Progress Grade.<br>   d. Check **Main** under Report on Terms. Then check the Terms to include.<br>   e. Choose the grading task under **Grading Tasks** that contains the In-Progress Grade/Posted Grade you wish to display.<br>   f. Select any **other** boxes you'd like to include<br><br>3. Choose an **Ad Hoc Filter** or a **Grade**.<br><br>4. Check **Active Only**.<br><br>5. Enter the **Effective Date**.<br><br>6. Choose **Sort Options.**<br><br>7. **Generate Report** |

| Print Report Card | Print report cards for All Students or Grade. | *Menu >Grading & Standards > Reports > Report Card* | 1. Choose the **Report Option** <br><br> 2. Select an **ad hoc** or Choose a **Grade** <br><br> 3. Check **Active Only** for current students <br><br> 4. Enter **Effective Date** <br><br> 5. Select **Sort Options** <br><br> 6. Selec**t Batch Queue Options** <br><br> 7. **Generate Report** |
| --- | --- | --- | --- |