



Advanced Reports

Advanced Reports compiles, views and tracks specific student data. The **More Search Options** feature is used to narrow the criteria for search results that will pull into the report. Data in the report can be filtered and saved. The report can be exported to Excel or a PDF file for printing. The parameters and search criteria set in an Advanced Report can be saved for future use, and easily accessed from the **Reports** menu.

There are several features important to Advanced reports:

1. Set the Search Criteria
2. Run and Modify the Report
3. Save the Report



Set the Search Criteria

STEP 1: Navigate to **Students** → **Advanced Reports**.

STEP 2: Enter student name(s) or select a specific group of students by clicking on **More Search Options**. If no criteria are set, the report will run for all students assigned to the user.

STEP 3: The **More Search Options** modules can be opened and closed with the gray triangle. Set as many selections as needed to yield more specific search results.

STEP 4: Define the data that will populate the columns in the report from **Available Fields**.

- Click on **General** to expand the tab to select demographic fields such as student name, ID, grade level, etc.
- To add **Fields to include in Report**, click on the green + or click and drag the blue field.
- Click on **General** again to collapse the tab after making selections.
- Continue to click on the tab names to find and select data fields to be included in the report.
- Rearrange the fields to include in report by clicking and dragging the blue field boxes in the order the columns should appear in the report.
- Remove a selected field by clicking on the red X.

STEP 5: Decide whether to **Search All Schools** and/or to **Include Inactive Students**.

STEP 6: Click **Run Report** after all report parameters have been selected.



Run and Modify the Report

- Once the report is run, the **Modify Report** button can be clicked to go back and modify the parameters. (All criteria set in **More Search Options** will need to be re-entered.)
- Click on any student's name to display their record.



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- Click **Filter** to narrow the results to a specific set of data. Additional **Filter Rules** can be added as needed using the **Add Rule** button.
- Data underlined in blue can be updated from the screen. Click **Save**.



Save the Report

STEP 1: Save the parameters and search criteria of the report by clicking **Create Report**.

STEP 2: Enter a **Report Title** and click **OK**.

STEP 3: Rerun the saved report by navigating to **Reports** → **My Reports**.



Tips: Creating a report does not save the data results, only the selected parameters.

- To save the data results, select the Print button at the bottom of the page.
- To export as an Excel spreadsheet, click the icon in the top-left corner next to the total number of students.