

Reports in SchoollInsight

Custom Reports

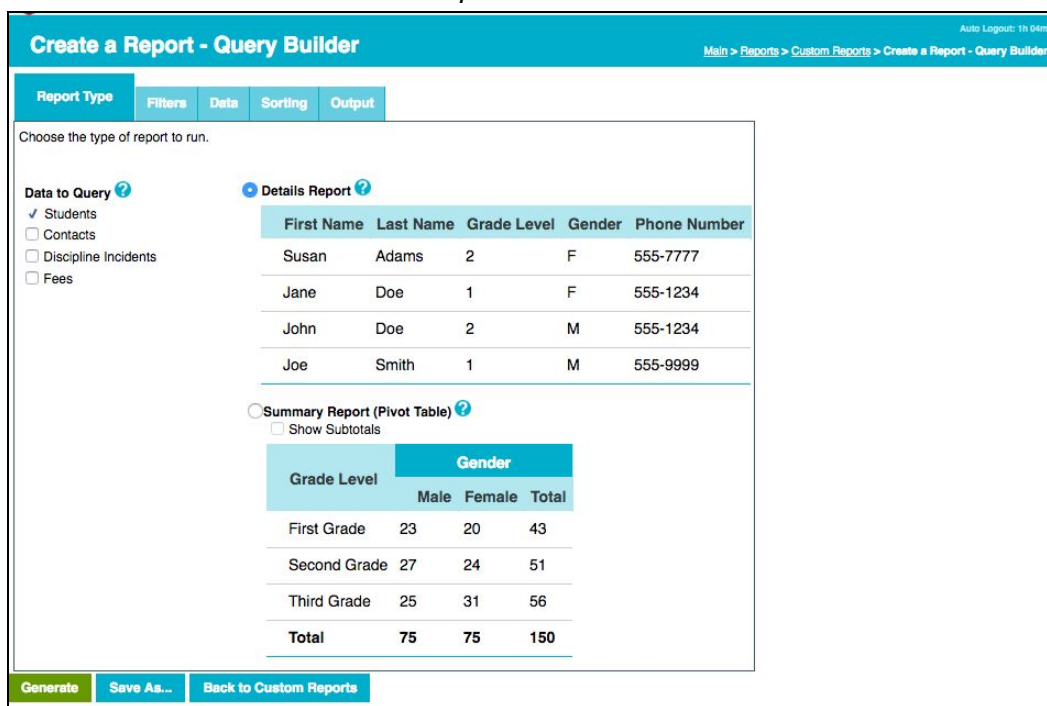
Admin Main > Reports > Custom Reports

Custom reports allow you to pull student, contact, fee, and discipline data from the SchoollInsight. Reports can be created as detailed reports or summary reports (pivot table).

Details Report

Start by selecting the data you'd like to use and the type of report you'd like to run.

**Reports can be run for either fees or discipline but not both at the same time*



Create a Report - Query Builder Auto Logout: 1h 04m

Main > Reports > Custom Reports > Create a Report - Query Builder

Report Type | Filters | Data | Sorting | Output

Choose the type of report to run.

Data to Query

- Students
- Contacts
- Discipline Incidents
- Fees

Details Report

First Name	Last Name	Grade Level	Gender	Phone Number
Susan	Adams	2	F	555-7777
Jane	Doe	1	F	555-1234
John	Doe	2	M	555-1234
Joe	Smith	1	M	555-9999

Summary Report (Pivot Table)

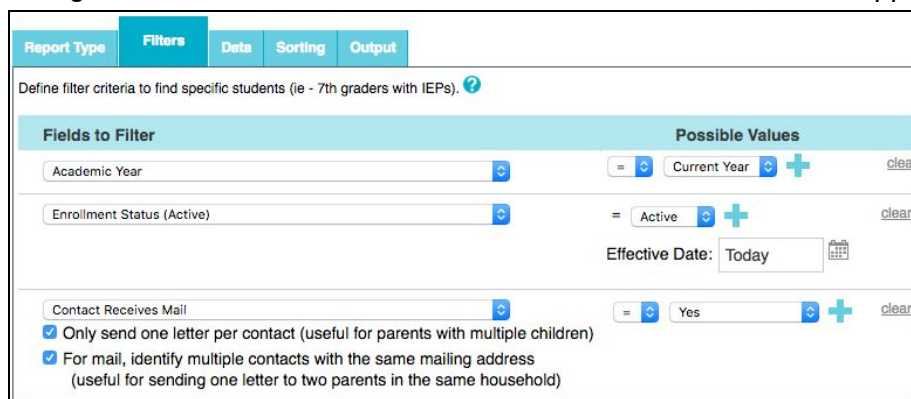
Show Subtotals

Grade Level	Gender		
	Male	Female	Total
First Grade	23	20	43
Second Grade	27	24	51
Third Grade	25	31	56
Total	75	75	150

Generate | Save As... | Back to Custom Reports

Adjust your filters to narrow the scope of your report.

**Selecting certain options under "Data to Query" will cause filters to appear by default. For example, selecting "contacts" creates a "Contact Receives Mail = Yes" filter to appear.*



Report Type | Filters | Data | Sorting | Output

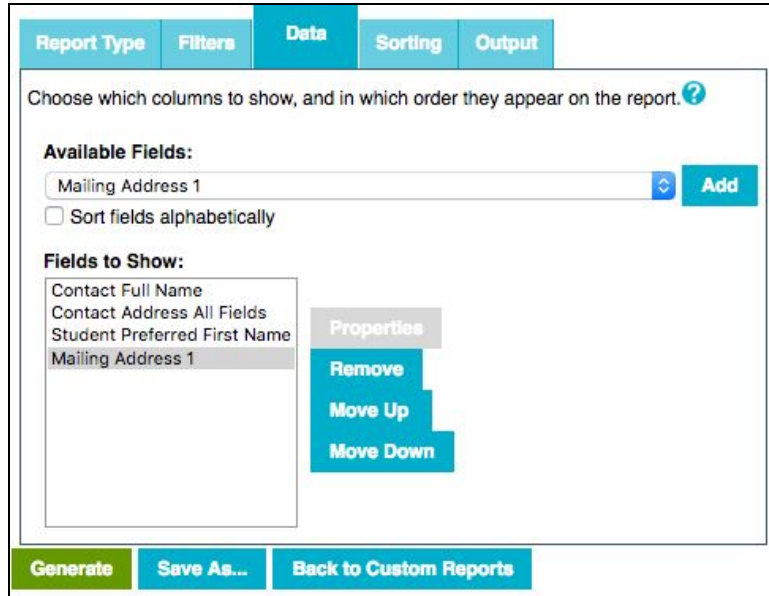
Define filter criteria to find specific students (ie - 7th graders with IEPs).

Fields to Filter	Possible Values
Academic Year	= Current Year
Enrollment Status (Active)	= Active
Contact Receives Mail	= Yes

Effective Date: Today

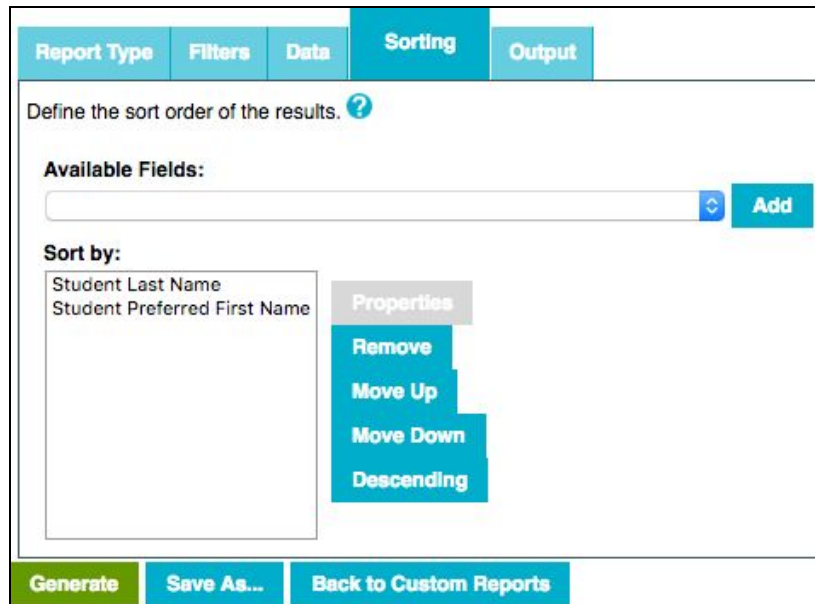
- Only send one letter per contact (useful for parents with multiple children)
- For mail, identify multiple contacts with the same mailing address (useful for sending one letter to two parents in the same household)

Select the data you'd like to include in the report. Fields are sorted by category, selecting the "Sort fields alphabetically," will list all available fields alphabetically.



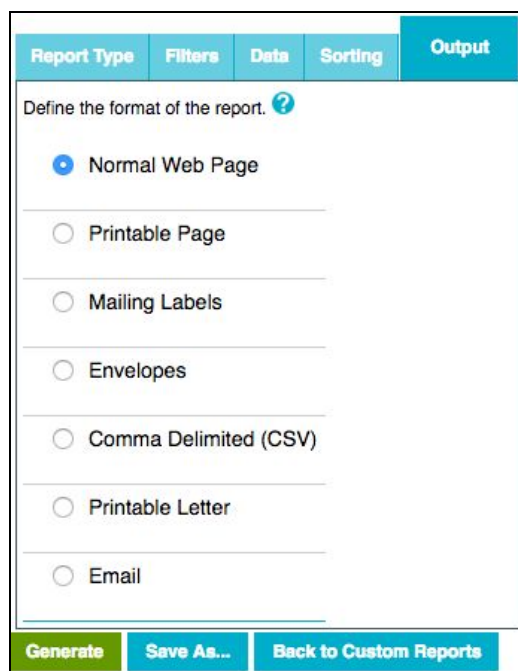
The screenshot shows the 'Data' tab of a report configuration interface. At the top, there are tabs for 'Report Type', 'Filters', 'Data', 'Sorting', and 'Output'. Below the tabs, a heading reads 'Choose which columns to show, and in which order they appear on the report.' followed by a help icon. Under 'Available Fields:', there is a dropdown menu with 'Mailing Address 1' selected and an 'Add' button. A checkbox for 'Sort fields alphabetically' is present and unchecked. Under 'Fields to Show:', a list contains 'Contact Full Name', 'Contact Address All Fields', 'Student Preferred First Name', and 'Mailing Address 1'. To the right of this list are buttons for 'Properties', 'Remove', 'Move Up', and 'Move Down'. At the bottom, there are buttons for 'Generate', 'Save As...', and 'Back to Custom Reports'.

The "Sorting" tab allows you to order the data appearing in the report by certain fields.

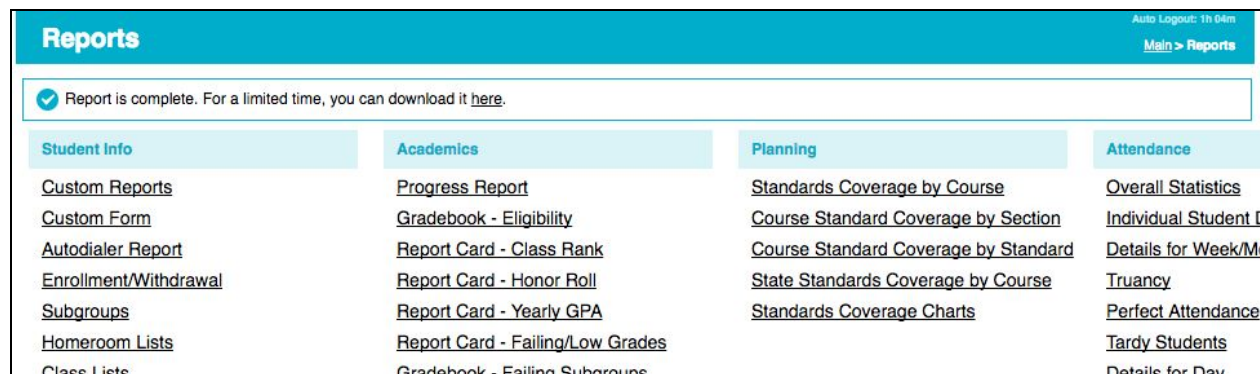


The screenshot shows the 'Sorting' tab of the report configuration interface. At the top, there are tabs for 'Report Type', 'Filters', 'Data', 'Sorting', and 'Output'. Below the tabs, a heading reads 'Define the sort order of the results.' followed by a help icon. Under 'Available Fields:', there is an empty dropdown menu and an 'Add' button. Under 'Sort by:', a list contains 'Student Last Name' and 'Student Preferred First Name'. To the right of this list are buttons for 'Properties', 'Remove', 'Move Up', 'Move Down', and 'Descending'. At the bottom, there are buttons for 'Generate', 'Save As...', and 'Back to Custom Reports'.

Determine your output and select “Generate.”



1. Normal Web Page - Displays the data for review as a list
2. Printable Page - Similar to normal web page but removes the color and adjusts the formatting for printing
3. Mailing Labels - Prints the data pulled in the report on mailing labels. More options appear to determine the mailing label size and where on the page the first label is printed.
4. Envelopes - Similar to mailing labels but prints on envelopes directly.
5. Comma Delimited (CSV) - For opening as a spreadsheet. This format loads to the reports page with a clickable download link.



Student Info	Academics	Planning	Attendance
Custom Reports	Progress Report	Standards Coverage by Course	Overall Statistics
Custom Form	Gradebook - Eligibility	Course Standard Coverage by Section	Individual Student
Autodialer Report	Report Card - Class Rank	Course Standard Coverage by Standard	Details for Week/M
Enrollment/Withdrawal	Report Card - Honor Roll	State Standards Coverage by Course	Truancy
Subgroups	Report Card - Yearly GPA	Standards Coverage Charts	Perfect Attendance
Homeroom Lists	Report Card - Failing/Low Grades		Tardy Students
Class Lists	Gradebook - Failing Subgroups		Details for Day

6. Printable Letter - Loads the data pulled in a report into a letter template. Templates are created from *Admin Main > Letter Templates*

7. Email - Similar to printable letter, but sends the data as an email. Still created from a letter template.

Custom reports can be saved and reused by using the “Save As...” button. You must generate the report for it to be saved. Updating the report and saving again, will replace the old report.

Save reports are available from the Custom Reports page. The “run” link can be used to run the report without reviewing the settings.

Auto Logout: 1h 04m
Main > Reports > Custom Reports

Custom Reports

Easily build, run, and save custom student reports. Format and output the data in any number of ways.

Academic Year: **2016-17** ▾

Report	Type	Data	Format	Created By	
New Sample Report	Details	Contacts	Normal Web Page	Adam Admin	run edit delete
Sample	Details	Students	Mailing Labels	Adam Admin	run edit delete
Sample Admin Report	Details	Students	Normal Web Page	Sample Admin	run edit delete

Create a New Report - Query Builder
Back

More information about details reports is available from [Help > Online Help](#)

Summary Report (Pivot Table)

Summary reports are great for breaking data down into subgroups. Start by selecting the data you'd like to use and the type of report you'd like to run.

Auto Logout: 1h 04m
Main > Reports > Custom Reports > Create a Report - Query Builder

Create a Report - Query Builder

Report Type
Grouping
Graphs
Filters
Drill Down
Sorting
Output

Choose the type of report to run.

Data to Query ?

Students

Contacts

Discipline Incidents

Fees

Details Report ?

First Name	Last Name	Grade Level	Gender	Phone Number
Susan	Adams	2	F	555-7777
Jane	Doe	1	F	555-1234
John	Doe	2	M	555-1234
Joe	Smith	1	M	555-9999

Summary Report (Pivot Table) ?

Show Subtotals

Grade Level	Gender		
	Male	Female	Total
First Grade	23	20	43
Second Grade	27	24	51
Third Grade	25	31	56
Total	75	75	150

Generate
Save As...
Back to Custom Reports

Use the preview to build your table.

Report Type **Grouping** Graphs Filters Drill Down Sorting Output

Define how the results are grouped. ?

Available Fields:

 Sort fields alphabetically

Rows:

Columns:

Preview:

Grade Level	Gender(1)	Gender(2)	Total
Grade Level(1)			
Grade Level(2)			

Determine your graph settings.

Report Type Grouping **Graphs** Filters Drill Down Sorting Output

Graph the results to show a visual representation of the data. ?

What to Graph:
 No Graphs
 Graph each column
 Graph each row

Graph Type:

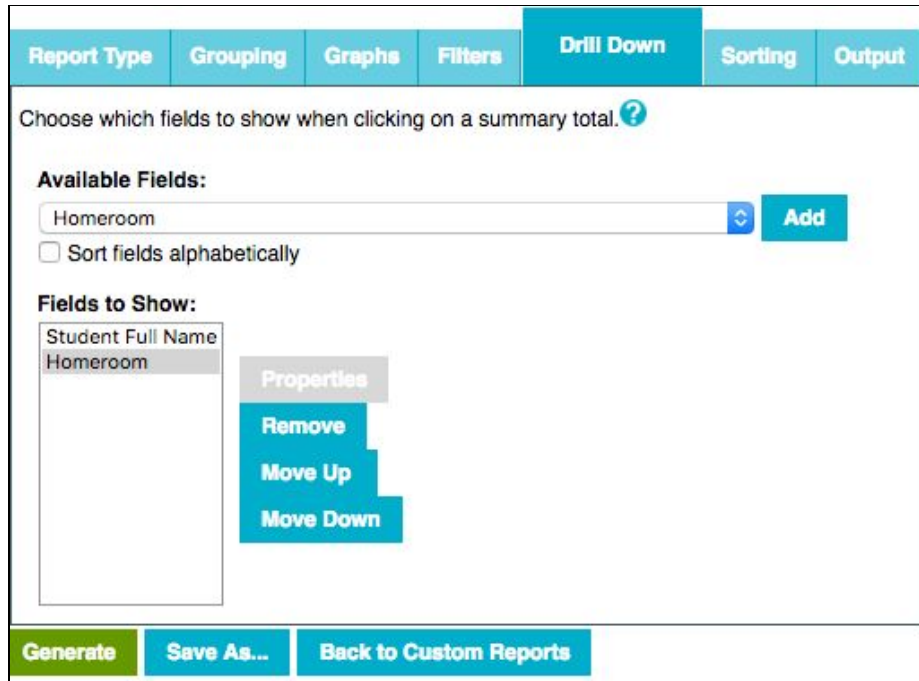
Options:
 All columns in a single chart
 Each Gender in a separate chart
 Each column in a separate chart

Graph Size:

Adjust your filters to narrow the scope of your report.

**Selecting certain options under “Data to Query” will cause filters to appear by default. For example, selecting “contacts” creates a “Contact Receives Mail = Yes” filter to appear.*

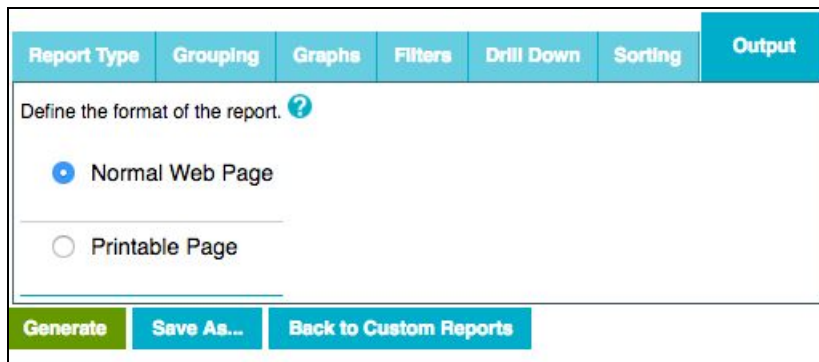
Determine your drill down. Drill down data will display when a summary total is clicked.



The screenshot shows the 'Drill Down' configuration panel. At the top, there are tabs for 'Report Type', 'Grouping', 'Graphs', 'Filters', 'Drill Down', 'Sorting', and 'Output'. The 'Drill Down' tab is active. Below the tabs, there is a heading 'Choose which fields to show when clicking on a summary total.' followed by a question mark icon. Under 'Available Fields:', there is a search box containing 'Homeroom' and an 'Add' button. A checkbox for 'Sort fields alphabetically' is present and unchecked. Under 'Fields to Show:', there is a list box containing 'Student Full Name' and 'Homeroom'. To the right of the list box is a 'Properties' menu with 'Remove', 'Move Up', and 'Move Down' options. At the bottom of the panel are three buttons: 'Generate', 'Save As...', and 'Back to Custom Reports'.

The “Sorting” tab allows you to order the data appearing in the report by certain fields.

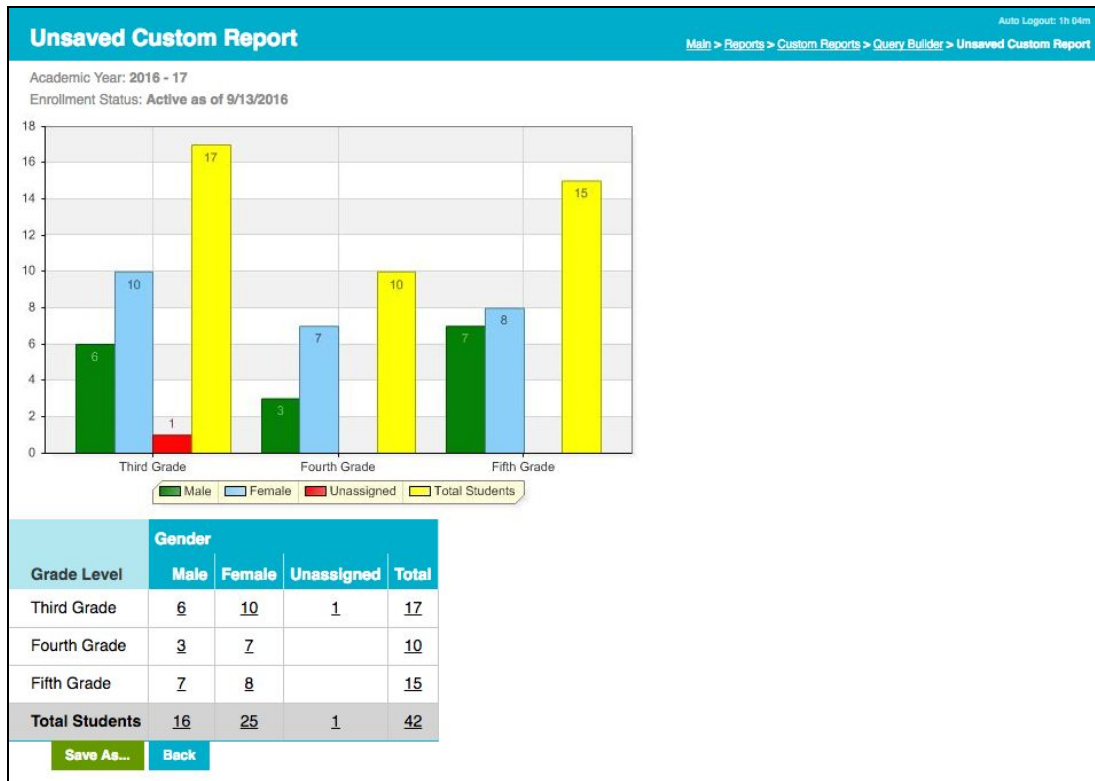
Determine your output and select “Generate.”



The screenshot shows the 'Output' configuration panel. At the top, there are tabs for 'Report Type', 'Grouping', 'Graphs', 'Filters', 'Drill Down', 'Sorting', and 'Output'. The 'Output' tab is active. Below the tabs, there is a heading 'Define the format of the report.' followed by a question mark icon. There are two radio button options: 'Normal Web Page' (which is selected) and 'Printable Page'. At the bottom of the panel are three buttons: 'Generate', 'Save As...', and 'Back to Custom Reports'.

1. Normal Web Page - Displays the data for review as a list
2. Printable Page - Similar to normal web page but removes the color and adjusts the formatting for printing

Generated report



Drill Down - accessed by clicking the data totals

Unsaved Custom Report

Academic Year: 2016 - 17
Enrollment Status: Active as of 9/13/2016
Gender: F

Student Full Name	Homeroom	Grade Level
Rachelle A Arias	Cotton, Jim	3
Rhona Xaviera Cunningham	Davis, Blair	4
Reagan A Epperly	Cotton, Jim	3
Anna Fitzgerald	Hipple, Nathan	5
Ella Idona Gardner	Davis, Blair	4
Kayla Gibson	Hipple, Nathan	5
Hayley Sylvia Hodges	Davis, Blair	4
Vivian Charity Knapp	Davis, Blair	4

Custom Forms

Admin Main > Reports > Custom Forms

Custom forms display student information on a printable page that can be distributed to contacts for review or updating.

Start by determining which students will be included in the report.

Show Which Students?	
<input type="radio"/>	No Students - Print a Blank Form
<input checked="" type="radio"/>	Single Student: <input type="text" value="Mills, Raven A"/> <input type="button" value="✕"/>
<input type="radio"/>	All students in Grade Level: <input type="button" value="3 - Third Grade"/> <input type="button" value="4 - Fourth Grade"/> <input type="button" value="5 - Fifth Grade"/> <input type="button" value="Select All"/>
<input type="radio"/>	Class: <input type="text" value="3 Lunch (Section Bell Schedule 1 2, 4 M-F)"/>
<input type="radio"/>	Homeroom: <input type="text" value="Mr. Jim Cotton"/>
<input type="radio"/>	Advisor: <input type="text" value="Mr. Jim Cotton"/>
<input type="radio"/>	All students in school

If contacts are included in the form, determine the options for which contacts will be included and how many.

**Contact information needs to be ended to the end of the form.*

Contact Options (if applicable)	
Number of contacts to show:	<input type="text" value="3"/>
Custodial Status	<input type="text" value="Any"/>
Web/Records Access	<input type="text" value="Any"/>
Receives Email	<input type="text" value="Any"/>
Receives Mail	<input type="text" value="Any"/> <input type="checkbox"/> Do not send duplicates to a contact
Can Pick Up Student	<input type="text" value="Any"/>
Prevent All Contact with Student	<input type="text" value="Any"/>
<input type="checkbox"/> Hide students with no matching contacts	

Determine the sorting options for when the forms are printed.

Sort Students By?
<input type="text" value="Last Name"/>

Use the preview to design the form. Sizing on the preview may be slightly different than the generated form depending on printer settings.

Design Form

Available Fields:

-Comments-

Add Field→

Selected Fields:

General Settings

-Header: Student Data...

-Comments: Please review and co...

Student First Name

Student Middle Name

Student Last Name

Entire Mailing Address

Grade Level

Preview:

Online Registration Form

Student Data

Please review and correct the student information below.

Student First Name	Student Middle Name	Student Last Name
Entire Mailing Address		
Grade Level	SSN	Birth Date
Birth Place	Gender	Race (Please check all applicable)
<input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> White <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Native Hawaiian or Other Pacific Islander		
Disability	Primary Home Language	Low Income
Student Email Address		

Contact Data

Please review and correct the contact information below.

Contact Relationship Contact Name		
Contact Home	Contact Work Phone	Contact Cell Phone
Phone		
Contact Address All Fields		
Contact Employer	Contact Can Pickup	Contact Email
Address		

Contact Relationship Contact Name		
Contact Home	Contact Work Phone	Contact Cell Phone
Phone		
Contact Address All Fields		

Generate
Back


Header and comment fields can include HTML. Use “Refresh Preview” to update the preview with changes.

New forms can be saved and used again.

Save as:

Run a Saved Form

Form:



Reports in SchoolInsight

© Common Goal Systems, INC. 2016

Once generated, forms include student information stored in the system.

Online Registration Form		
Student Data		
Please review and correct the student information below.		
First Name: Raven	Middle Name: A	Last Name: Mills
Mailing Address: 290 Francis Dr. Geneva, IL 60134		
Grade Level: 3	SSN:	Birth Date: 1/22/2008
Birth Place: Place	Gender: F	Race (Please check all applicable) <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input checked="" type="checkbox"/> White <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Native Hawaiian or Other Pacific Islander
Disability:	Primary Home Language:	Low Income:
Student Email Address: RMills@fakestudent.edu		
Contact Data		
Please review and correct the contact information below.		
Contact Relationship: Mother	Name: Cindy Mills	
Home Phone: 217-424-3000	Work Phone:	Cell Phone:
Address: 290 Francis Dr. Geneva, IL 60134		
Employer:	Can Pick Up Student?: Y	Email Address: CMills@fakeparentemail.com
Contact Relationship: Father	Name: Michael Mills	
Home Phone: 217-424-3009	Work Phone:	Cell Phone:
Address: 290 Francis Dr. Geneva, IL 60134		
Employer:	Can Pick Up Student?: Y	Email Address: MMills@fakeparentemail.com
Contact Relationship: Other/Unknown	Name: John Smith	
Home Phone:	Work Phone:	Cell Phone:
Address:		
Employer:	Can Pick Up Student?: N	Email Address: JSmith@fakeparent.com

Letter Templates

Admin Main > Letter Templates

Letter templates are used as outputs for various reports. Data from the report is injected into the middle of the letter template and can be printed or sent via email to contacts.

It is important to set the correct “template type” as this will determine to which reports the letter template is made available.

The description is the title of the template and is not displayed to contacts, only the admin creating the report.

*Template Type:	Lunch <input type="button" value="v"/>
*Description:	<input type="text"/>

The “Report Details” is the information generated from the report used with the letter template. It sits between the top and bottom body text that is entered as part of the template.

*Top Body	This notice indicates the balance on your child's lunch account. A balance surrounded with () indicates an amount due. No surrounding () indicates a positive balance. REMINDER: The district policy is to pull cards with negative balances greater than -\$10.00. A notice will be sent home with the child when this happens. Please review your account details below:
Report Details	Details determined by type of report.
*Bottom Body	The lunch program operates as a debit account, not a credit account. Lunch must be paid for before the child eats hot lunch. We strongly recommend payment by check for the best accountability. All payments must include a deposit slip which are available in the front office. For questions regarding lunch please call the office.

The “Letter Signature” can be used to outline contact information for the school/department.

Letter Signature	
-------------------------	--

If the letter template is going to be used as an email, the subject of the email can be included in the “subject” box.

*Subject: (email only)	Lunch Balance Notification
-----------------------------------	----------------------------

The number of templates printed per page can be set and the letter template can be marked inactive when it is no longer being used.

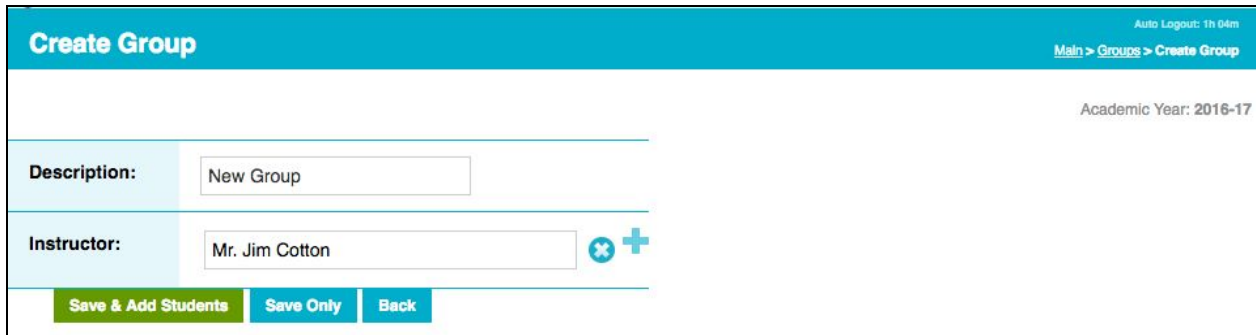
*Number Templates Printable per Page:	<input type="text" value="4"/>
Active:	<input type="button" value="Yes"/>

Groups

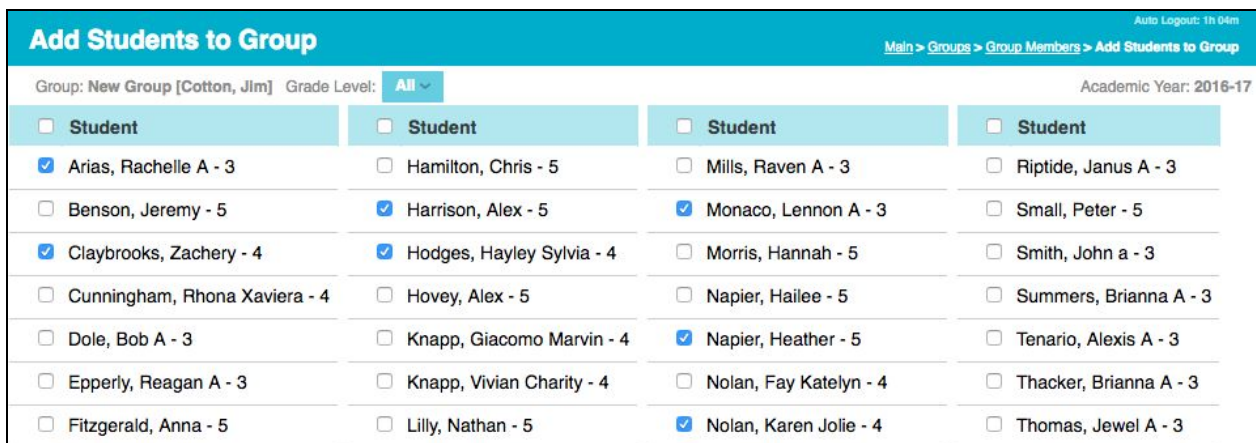
Admin Main > Groups or Instructor Main > Tools > Groups

Groups enable admin and instructors to run reports for a set of students that are otherwise not connected.

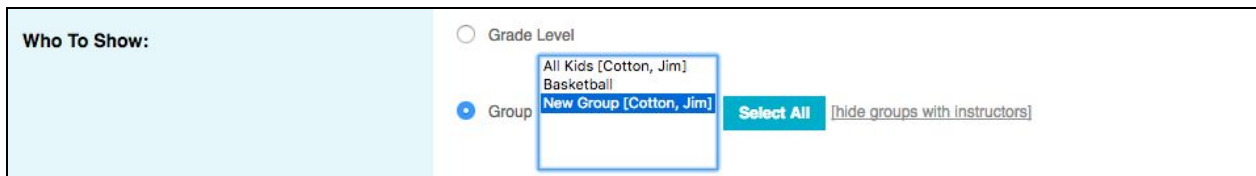
Groups can be assigned to instructors.



Then add students to the group.



Reports can then be run for a group of students.



This is most frequently used for clubs/sports or to enable instructors to run progress reports for students not in their class. *Instructor Main > Gradebook > Reports > Progress Report*

Common Reports by Type

Attendance

Reports are available for both daily and period attendance.

Overall Statistics

Admin Main > Attendance > Overall Statistics

The overall statistics report can be used for average daily attendance information. The “Group By” option breaks the report down by different student fields.

Academic Year: **2016-17** ▼

Time Frame:	<input checked="" type="radio"/> Year <input type="radio"/> Grading Period Q1 ▼ <input type="radio"/> Month September 2016 ▼ <input type="radio"/> Week Monday 9/12/2016 ▼ <input type="radio"/> Day Tuesday 9/13/2016 ▼ <input type="radio"/> Date Range Start: 7/14/2016 ▼ End: 7/14/2016 ▼
Who To Show:	<input checked="" type="radio"/> Grade Level <div style="border: 1px solid gray; padding: 2px; display: inline-block;"> 3 - Third Grade 4 - Fourth Grade 5 - Fifth Grade </div> <input type="button" value="Select All"/> <input type="radio"/> Group
Home School:	<input type="text" value="Self"/> <input type="text" value="External School 1"/> <input type="button" value="Select All"/>
Serving School:	<input type="text" value="Self"/> <input type="text" value="External School 1"/> <input type="button" value="Select All"/>
Claimable for State Aid:	<input type="text" value="All"/> ▼
Tuition Paid to Another School:	<input type="text" value="All"/> ▼
Group By:	<input type="text" value="Gender"/> ▼ <input type="text" value="Grade Level"/> ▼ <input type="text" value=""/> ▼
Options:	<input type="checkbox"/> Hide inactive students <input checked="" type="checkbox"/> Hide attendance codes <input checked="" type="checkbox"/> Show school name <input type="checkbox"/> Printable Page
<input type="button" value="Generate Report"/> <input type="button" value="Back"/>	

Auto Logout: 1h 04m

Overall Attendance Statistics

Main > Reports > Overall Attendance Statistics

Academic Year: 2016-17 Timeframe: Year Grade Level: All Home: Self Serving: Self

Gender	Grade Level	School Days	School Days with Data	Student Days	Student Days with Data	Days Present	Days Absent	Average Daily Attendance (ADA)
Female	3	225	10	2250	43	39.5 (91.9%)	3.5 (8.1%)	3.95
	4	225	10	1575	29	24 (82.8%)	5 (17.2%)	2.4
	5	225	10	1800	8	8 (100%)	0 (0%)	0.8
Male	3	225	10	1350	26	26 (100%)	0 (0%)	2.6
	4	225	10	675	9	9 (100%)	0 (0%)	0.9
	5	225	10	1575	7	7 (100%)	0 (0%)	0.7
Unassigned	3	225	10	225	4	4 (100%)	0 (0%)	0.4
Total		225	10	9450	126	117.5 (93.3%)	8.5 (6.7%)	11.75

Truancy

Admin Main > Attendance > Truancy

The truancy report can filter students by the number of days absent, tardy, or early dismissal.

Absent:	<input checked="" type="checkbox"/> Find students with absences in the range: Min <input type="text" value="5"/> Max <input type="text"/> <input type="checkbox"/> Exclude excused absences
Tardy:	<input type="checkbox"/> Find students with tardies in the range: Min <input type="text"/> Max <input type="text"/> <input type="checkbox"/> Exclude excused tardies
Early Dismissal:	<input type="checkbox"/> Find students with early dismissals in the range: Min <input type="text"/> Max <input type="text"/>

This report can output to letter templates.

Where Shown?	<input type="radio"/> Normal Web Page <input type="radio"/> Printable Page <input type="radio"/> Mailing Labels <input type="radio"/> Envelopes <input checked="" type="radio"/> Printable Letter Template: <input type="text" value="Truancy Probation"/> Recipient: <input type="text" value="Specific Contacts"/> <input checked="" type="checkbox"/> Print only one letter when multiple contacts have the same mailing address. (useful to reduce mailing costs for multi-parent families) <input checked="" type="checkbox"/> Show Recipient's Address <input checked="" type="checkbox"/> Show only students lacking contacts with email addresses <input checked="" type="checkbox"/> Show Letterhead <input checked="" type="checkbox"/> Show Date <input checked="" type="checkbox"/> Letters Per Page <input type="text" value="2"/> <input checked="" type="checkbox"/> Print Homeroom Instructor <input type="radio"/> Email
<input type="button" value="Generate Report"/> <input type="button" value="Back"/>	

When printing letter templates, emails can be sent. Letters can then be printed only for students with contacts lacking an email address, preventing duplicate notifications.

Standards-based Grading

Standards Coverage by Course

Admin Main > Reports > Standards Coverage by Course

The standards coverage by course can be used to determine how many standards are assigned to each course and the number of time standards have been linked to units, lessons, and assignments.

Data is clickable and can be drilled into.

Auto Logout: 1h 04m

Standards Coverage by Course

Main > Reports > Standards Coverage by Course

Compare standards covered by different curriculum entities to ensure that units, lesson plans, and assignments are being aligned to standards.

Academic Year: 2016-17

Timeframe:	<input checked="" type="radio"/> Year <input type="radio"/> Grading Period <input type="radio"/> Month
Subject Type:	<input type="text" value="Any"/>
Grade Level:	<input type="text" value="Any"/>
Instructor:	<input type="text" value="Type here to search for an instructor."/>
Course:	<input type="text" value="LD3SC2 3rd Grade Science (1, Science)"/>
*Curriculum Types:	<input checked="" type="checkbox"/> Units <input checked="" type="checkbox"/> Lesson Plans <input checked="" type="checkbox"/> Assignments
Options:	<input type="checkbox"/> Printable <input checked="" type="checkbox"/> Hide courses with no standards

Generate
Back

Auto Logout: 1h 04m

Course Standard Coverage by Section

Main > Reports > Course Standard Coverage by Section

Year: 2016-17
Course: LD3SC2 3rd Grade Science(1,Science)
Standards Count: 32

Section	Unit		Lesson Plans		Assignments		
	Count	Standards Covered	Count	Standards Covered	Count	Standards Covered	
LD3SC2 3rd Grade Science (Section 1, Cotton, Jim, 5 M-F)	5	4	5	2	16	2	details
LD3SC2 3rd Grade Science (Section 2, Cotton, Jim)	0	0	0	0	11	3	details
Total: 0 sections	0	0	0	0	0	0	

Back

Employee Details

Admin Main > Reports > Employee Details

This report can be used to pull information entered about employees at your school/district. Use filters to determine which employees are included in the report.

Filter Employees	
SchoolInsight User Role:	<div style="border: 1px solid gray; padding: 2px;"> School District Admin School Admin Other Instructors </div> <input type="button" value="Select All"/>
Active:	Any <input type="button" value="v"/>
Employment Start Date:	Any <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/>
Employment End Date:	Any <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/>
Tenured:	Any <input type="button" value="v"/>
Birthdate:	Any <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/>
Gender:	Any <input type="button" value="v"/>
Ethnicity:	Any <input type="button" value="v"/>
Race:	Any <input type="button" value="v"/>
Position Type:	Any <input type="button" value="v"/>
Highest Degree:	Any <input type="button" value="v"/>
Integer 2:	Any <input type="button" value="v"/> <input type="text"/>

Determine the fields pulled and the output format.

Employee Custom Data	
No role specific custom fields used.	
Sort Employees By	
Last Name <input type="button" value="v"/>	
Fields to Show	
Available: Active Address 1 Address 2 Birthdate Cell Phone City Email Address Email Deliverable Employee Number Employment End Date Employment Start Date Ethnicity First Name	Selected: Full Name Mailing Address All Fields
<input type="button" value="Add ->"/> <input type="button" value="Remove <-"/>	<input type="button" value="Move Up"/> <input type="button" value="Move Down"/>