Report Setup in PowerSchool

Report Setup for:

- **Report Cards**
- **Form Letters**
- **Mailing Labels**

Report Cards

Report card reports can be used for much more than just end-of-the-term reports. You can also use them to create other types of documents, such as custom letters or progress reports. Any report card-style report can include text as well as PowerSchool fields.

You can only create report cards for the term selected on the start page. To report on more than one term, create an object report. For more information, see *Object Reports*.

How to Open a Preview Page

When creating custom reports, it is a good idea to preview them often as you work. Therefore, before you create any new reports, you should open a preview page in your Web browser.

1. On the start page, search for and select any student or group of students. For more information, see *Select a Group of Students*.
2. Click the PowerSchool logo. The start page appears.
3. Choose **Reports** from the main menu. The Reports page appears.
4. Click the **Setup** tab. The Report Setup page appears.
5. Click **Form Letters**. The Form Letters page appears.
6. Click **Print**. Leave the Print Reports page open as you create each type of report in a new Web browser window. You will return to it to review the report template as you work. Within other instructions, this page is referred to as the preview page.

How to Add a Custom Report Card Template

You can customize the following elements of a report card template:

- *Heading*
- *Schedule Listing*
- *Footer*
- *Availability*
- *Page Setup*
- *Print Setup*

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Report Cards**. The Report Cards page appears.
4. Click **New**. The Create New Report Card Format page appears.
5. Use the following table to enter information in the fields:

Field	Description
Name of new report card template	Enter a name for the template.
Title	Enter a title to print at the top of the report card. Use data codes or some HTML tags in addition to text.
Title style	Choose a style from the pop-up menu. To configure the styles, see *System Styles*.

6. Click **Submit**. The Report Cards page appears.
7. Click the report you just created.
8. On the Report Card page, choose either **Left**, **Center**, or **Right** title justification from the pop-up menu.
9. Click **Submit**. The report card template setup and title are complete.

Heading

The heading can include any type of information, such as your school's address, a note to parents, some HTML tags, or data codes that pull information from the PowerSchool database.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Heading**. The Report Card Heading page appears.
3. Use the following table to enter information in the fields:

Field	Description
Heading Text Style	Choose the style for the heading text from the pop-up menu.
Justification	Choose the heading alignment from the pop-up menu.

4. Enter the content of the heading in the large white field using text, some HTML tags, and PowerSchool data codes. Click **Fields** to view a list of PowerSchool fields. Click the name of a field to insert it in this field. For more information about data codes, visit PowerSource.
5. Click **Submit**. The Report Card page appears.
6. Click **Submit** again to save the report template.

Schedule Listing

Format schedule listings to display grades, citizenship, absences, tardies, and scores for individual assignments.

Note: This listing is referred to as a Student Schedule when printing reports. For more information, see *Run, Print, and Save Reports*.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Schedule Listing**. The Student Schedule Listing page appears.
3. Use the following table to enter information in the fields:

Field	Description
Column Titles Style	Choose a style for the column titles from the pop-up menu.
Class Listings Style	Choose a style for the class listings from the pop-up menu.
Use Future Schedule	Select the checkbox to use next year's student schedules. To use this year's schedules, deselect the checkbox.

4. Complete the remaining items, which concern the format of the report card, as necessary. To use the defaults, do not make any changes to the formatting fields. For further explanation of the fields, see *Report Formatting*. Select what data will comprise the schedule listings in the columns.
5. Use the following table to enter information in the fields:

Field	Description
Shows	Use the pop-up menu to choose the information for the first column on the report card. Use the next field only if you make certain choices for the Shows column. If you select any of the following in the Shows column, enter a specific term preceded with a semicolon in the next field: ○ **absences** ○ **tardies** ○ **attendancepoints** ○ **previousgrade** ○ **prev. percent** ○ **prev. tchr. cmnt** ○ **prev citizenship** ○ **prev crdit hours** For example, enter **;Q1** in the blank field next to the Shows column to display information for Q1. If you select **Attendance** in the Shows column, enter an attendance code. If you select **asmt score**, **asmt pct**, or **asmt pts poss** in the Shows column, enter an assignment name. The assignment

	name must exactly match that in the gradebook. When the Shows column is blank but you want a title for the column, enter text or an HTML tag in the next field. PowerSchool will use the information to populate that column of the report.
Column Title	Enter a column title.
Column Width	Enter a column width.
Align	Enter one of the following codes: ○ **R** for right justification ○ **L** for left justification ○ **C** for center justification

6. Repeat Step 5 for other columns to be included on the report card. Create up to 12 columns.
7. Use the following table to enter information in the fields:

Field	Description
...include only those classes	Select the checkbox for the students who have final grades recorded in the specified term (optional). In the space provided, enter the terms/store codes, such as **Q1**, **Q2**, and **Q3**. This tells PowerSchool to list only classes for which there are stored grades for the terms listed. When a student drops a class and does not receive a final grade, the class will not appear on the report card.
Extended stored grade retrieval	Select the checkbox to include additional stored grades. This is helpful when a student switches from one section of a course to another section of the same course. The courses and grades appear on one row of the report rather than different lines for each section.

8. Click **Submit**. The Report Card page appears.
9. Click **Submit** again to save the report template.

Footer

Next, set up the footer. The footer is exactly like the heading except that it appears below the schedule listings. It can contain any type of information, including your school's address, a note to parents, some HTML tags, or PowerSchool data codes.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Footer**. The Report Card Footer page appears.
3. Use the following table to enter information in the fields:

Field	Description
Footer text style	Choose the style for the footer text from the pop-up menu.
Justification	Choose the footer alignment from the pop-up menu.

4. Enter the content of the footer in the large white field using text, some HTML tags, and PowerSchool data codes. For a complete list of field codes, click **View Field List** on the PowerSchool start page. For more information about data codes, visit PowerSource.
5. Click **Submit**. The report card footer is created and the Report Card page appears.
6. Click **Submit** again to save the report template.

Availability

Specify which schools can access the report.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, select an option to indicate which schools on the PowerSchool system will have access to this report:
    - **users at all schools** [on the server]
    - **only users at** [selected school]
3. To indicate that teachers can print this report, select the checkbox.
4. Click **Submit**. The Report Cards page appears.
5. Click **Submit** again to save the report template.

Page Setup

Specify how the report fits on the page.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Margins & Page Setup**. The Report Card Margins page appears.
3. Use the following table to enter information in the fields:

Field	Description
Margins	Enter the margins in inches for the left, top, right, and bottom of the page.
Orientation	Choose the orientation from the pop-up menu: ○ **Portrait (vertical)**

	○ **Landscape (horizontal)**
Reduction	Enter a reduction scale (optional). This refers to the finished size of the report. Fit more on a page by reducing it by a percentage, but remember to leave it as large as possible for easier viewing.

4. Click **Submit**. The Report Card page appears.
5. Click **Submit** again to save the report template.

Print Setup

Specify how the report will print.

1. On the Report Cards page, click the name of the report.
2. On the Report Card page, click **Special Printing Options**. The Special Printing Options page appears.
3. Use the following table to enter information in the fields:

Field	Description
Multiple reports per page	Select the checkbox to create more than one report per page. If you select this option, enter the number of reports that appear across (in columns) and down (in rows) on each page.
Gutter Widths	If you are printing multiple reports on each page, enter the width for the gutter between the columns and rows.
Suppress column title printing	Select the checkbox to hide the column titles.

4. Click **Submit**. The Report Card page appears.
5. Click **Submit** again to save the report template.

How to Preview a Report Card

1. Open a report preview page. For more information, see *How to Open a Preview Page*.
2. Use the following table to enter information in the fields:

Field	Description
Which report would you like to print?	Choose the report from the pop-up menu.
For which students?	Select an option to indicate the students for whom to run the

	report, if necessary. Indicate the number of pages to print: ○ To print a report for all of the selected students, choose the **All records in a single batch** option. ○ To print a limited number of pages, choose the **Print only the first X record**s option and enter the number of pages to print. ○ To print batches of reports for all of the selected students, choose the **All records in batches of X records** option and enter the number of records to print per batch.
In what order?	Select the sort order.
If printing student schedules, use	Select an option to indicate enrollment specifications. If you select the **enrollment as of** option, enter the enrollment date in the field.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the "Which report to would you like to print" field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the "Date Range," enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, choose from the pop-up menu one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to start the report: ○ **ASAP**: Execute immediately. ○ **At Night**: Execute during the next evening. ○ **On Weekend**: Execute during the next weekend. ○ **On Specific Date/Time**: Execute on the date and time specified in the following fields.

3. Click **Submit**. The report appears with the specified parameters. Review the report to verify that the formatting and content are correct before printing.

How to Edit a Custom Report Card Template

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Report Cards**. The Report Cards page appears.
4. Click the name of the report you want to edit. The Report Card page appears.
5. Edit the report card to meet your needs and specifications. For more information, see *How to Add a Custom Report Card Template*.
6. Click **Submit**. The Report Cards page appears. If you are ready to run the report, see *Run, Print, and Save Reports*.

How to Delete a Custom Report Card Template

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Report Cards**. The Report Cards page appears.
4. Click the name of the report you want to delete. The Report Card page appears.
5. Click **Delete**. The Selection Deleted page appears.

Form Letters

Form letter reports create custom letters that merge information from the PowerSchool database into a letter. They are similar to report card reports in that you can use some HTML tags and PowerSchool data codes. The difference is that a form letter report cannot include schedule listings.

When creating a form letter, there is no need to open a preview page. You can easily create the report and preview it in the same Web browser window.

How to Add a Custom Form Letter

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Form Letters**. The Form Letters page appears.
4. Click **New**. The New Form Letter page appears.
5. Use the following table to enter information in the fields:

Field	**Description**

Title of this form letter	Enter a name for this form letter.
Table	Choose the table used for the form letter data from the pop-up menu.
Default font	Choose the form letter font from the pop-up menu.
Default font size	Choose the font size from the pop-up menu.
Default text line height	Enter the height for the space between lines on the mailing label in points. **Note:** One point is 1/72 of an inch.
Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Enter the size of the page margins in inches.
Orientation	Choose the page orientation from the pop-up menu. The orientation is the page layout. **Portrait** is a vertical page; **Landscape** is a horizontal page.
Scale	Enter the percentage to scale the form letter. The lower the percentage, the smaller the form letter scales relative to the size of the page.
This report available to	Select who can use this report: ○ **users at all schools** [on this PowerSchool system] ○ **only users at** [this school]
Teachers can print?	If you want teachers to be able to print this report in PowerSchool Teacher, select the checkbox. Otherwise, deselect the checkbox.

6. Click **Submit**. The form letter is set up, and the Form Letters page appears.
7. Click the form letter you just created. The Edit Form Letter page appears.
8. Click **Report Body**. The Edit Body page appears.
9. Enter the content of the letter in the large field using text, some HTML tags, and PowerSchool data codes as needed. For a complete list of field codes, click **Field List**. For more information about data codes, visit PowerSource.
10. Click **Submit**. The Form Letters page appears.
11. Click **Print**. The Print Reports page appears.

12. Use the following table to enter information in the fields:

Field	Description
Which report would you like to print?	Choose the form letter from the pop-up menu.
For which students?	Select an option to indicate the students for whom the report will be run, if necessary.
In what order?	Select the sort order.
If printing student schedules, use...	Select an option to indicate enrollment specifications. If you select the **enrollment as of** option, enter the enrollment date in the field.
If printing fee list, only include transactions conducted during... (may be overridden in report setup)	If you selected an Object Report in the **Which report to print** field and that Object Report includes a fee list object, choose the date range from the pop-up menu. If you select the **Date Range**, enter the beginning and ending dates in the fields using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field is submitted as a blank entry.
Watermark Text	To print text as a watermark on each page of the report, use the pop-up menu to either choose one of the standard phrases or choose **Custom** and enter the text you want to print as a watermark in the field.
Watermark Mode	Use the pop-up menu to determine how you want the text to print. **Watermark** prints the text behind objects on the report, while **Overlay** prints the text over objects on the report.
When to print	Select a time to run the report: o **ASAP**: Execute immediately. o **At Night**: Execute during the next evening. o **On Weekend**: Execute during the next weekend. o **On Specific Date/Time**: Execute on the date and time specified in the following fields.

13. Click **Submit**. The report queue appears.
14. Click **View** once the report is completed.

Note: Click **Refresh** to update the status of the report.

The page displays a PDF file of the report. Thoroughly review it to verify that the formatting and content are correct. If the report provides the data you need and is formatted properly, print it from this page or save it to another application.

How to Edit a Custom Form Letter

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Form Letters**. The Form Letters page appears.
4. Click the form letter you want to edit. The Edit Form Letter page appears.
5. Use the following table to edit information in the fields:

Field	**Description**
Title of this form letter	Edit this form letter's name.
Table	The table used for the form letter data appears.
Default font	Choose the form letter font from the pop-up menu.
Default font size	Choose the font size from the pop-up menu.
Default text line height	Edit the height for the space between lines on the mailing label in points. **Note:** One point is 1/72 of an inch.
Page Size	Choose from the pop-up menu the size of the paper on which you want to print this report. To enter a custom size, enter the horizontal and vertical page measurements in the Custom Size fields.
Margins	Edit the size of the page margins in inches.
Orientation	Choose the page orientation from the pop-up menu. The orientation is the page layout. **Portrait** is a vertical page; **Landscape** is a horizontal page.
Scale	Edit the percentage to scale the form letter. The lower the percentage, the smaller the form letter scales relative to the size of the page.
This report available to	Select who can use this report: o **users at all schools** [on this PowerSchool system]

	○ **Only users at** [this school]
Teachers can print?	If you want teachers to be able to print this report in PowerSchool Teacher, select the checkbox. Otherwise, deselect the checkbox.

6. Click **Report Body**. The Edit Body page appears.
7. Enter the content of the letter in the large field using text, some HTML tags, and PowerSchool data codes as needed. For a complete list of field codes, click **Field List**. For more information about data codes, visit PowerSource.
8. Click **Submit**. The Form Letters page appears. If you are ready to print the letter, see *Run, Print, and Save Reports*.

How to Delete a Custom Form Letter

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Form Letters**. The Form Letters page appears.
4. Click the name of the form letter you want to delete. The Edit Form Letter page appears.
5. Click **Delete**. The Selection Deleted page appears.

Mailing Labels

Use mailing label reports to generate mailing labels to put on envelopes or letters. Include names, addresses, ID numbers, passwords, or even bar codes. For example, create mailing labels with barcodes of students' lunch ID numbers to include on laminated lunch cards. For more information, see *How to Publish Lunch ID Numbers*.

How to Open a Mailing Label Preview Page

When creating mailing labels, you should preview them often as you work. Before you create or edit mailing labels, open a preview page.

1. On the start page, search for and select any student or group of students. For more information, see *Select a Group of Students*.
2. Click the PowerSchool logo. The start page appears.
3. Choose **Reports** from the main menu. The Reports page appears.
4. Click the **Setup** tab. The Report Setup page appears.
5. Click **Mailing Labels**. The Mailing Labels page appears.
6. Click **Print**. Leave the Print Mailing Labels page open as you work with mailing labels. You will return to it to review the template as you work. Within other instructions, this page is referred to as the preview page.

How to Add a Mailing Label Layout

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Mailing Labels**. The Mailing Labels page appears.
4. Click **New**. The New Mailing Label Layout page appears.
5. Use the following table to enter information in the fields:

Field	Description

Layout Name	Enter the name of the mailing label layout.
Table	Choose the table used for the mailing label data from the pop-up menu.
Font	Choose the mailing label font from the pop-up menu.
Font Size	Enter the font size for the mailing label in points. **Note:** One point is 1/72 of an inch.
Line Height	Enter the height for the space between lines on the mailing label in points. **Note:** One point is 1/72 of an inch.
Page Left Margin	Enter the size of the left page margin in inches.
Page Top Margin	Enter the size of the top page margin in inches.
Label Width	Enter the width of the individual mailing labels in inches.
Label Height	Enter the height of the individual mailing labels in inches.
How Many Columns of Labels	Enter how many columns of mailing labels print per page.
How Many Rows of Labels	Enter how many rows of mailing labels print per page.
Space Between Each Column	Enter the amount of space between columns of mailing labels on the page in inches.
Space Between Each Row	Enter the amount of space between rows of mailing labels on the page in inches.
Horizontal Padding For Label Text	Enter the amount of space from the sides of a mailing label to the text.
Vertical Padding For Label Text	Enter the amount of space from the top and bottom of a mailing label to the text.
Label Content	Enter the content of the mailing label in the large white field using text, some HTML tags, and PowerSchool data codes. Click **Fields** to view a list of PowerSchool fields. Click the name of a field to insert it in this field. For more information about data

	codes, visit PowerSource.
Make this label accessible to	Select which PowerSchool users can use the mailing label: ○ **users at all schools** [on the server] ○ **only users at** [selected school]
Teachers can print?	Select the checkbox if you want teachers to be able to print this mailing label.

6. Click **Submit**. The Mailing Labels page appears. To print mailing labels, see *Print Mailing Labels*.

How to Edit a Mailing Label Layout

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Mailing Labels**. The Mailing Labels page appears.
4. Click the mailing label layout you want to edit. The Edit Mailing Label Layout page appears.
5. Edit the report card to meet your needs and specifications. For more information, see *How to Add a Mailing Label Layout*.
6. Click **Submit**. The Mailing Labels page appears. To print mailing labels, see *Print Mailing Labels*.

How to Delete a Mailing Label Layout

1. On the start page, choose System Reports from the main menu. The Reports page appears.
2. Click the **Setup** tab. The Report Setup page appears.
3. Click **Mailing Labels**. The Mailing Labels page appears.
4. Click the mailing label layout you want to delete. The Edit Mailing Label Layout page appears.
5. Click **Delete**. The Selection Deleted page appears.