



SchoolMAX™

ReportMAX™ User Guide

Topics covered:

- Logging In/Out
- Using The Main Menu
- Viewing Reporting Options
- Running A Sample Report
- Saving A Report Template
- Saving, Printing, & Exporting A Sample Report



User's Guide

Version 1.0.0

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Using This Workbook

Using This Workbook

This document uses standard conventions for referring to objects within ReportMAX™. These conventions include the following:

The screenshot shows the SchoolMAX™ ReportMax Tools login interface. At the top left is the SchoolMAX™ logo and 'ReportMax Tools' text, with a red arrow and circled '1' pointing to it. At the top right is a 'Welcome!' message, a bus icon, 'powered by OtisEd' logo, and a red arrow and circled '2' pointing to 'Home' and 'Help' links. Below this is a blue 'Login' header. Under the header are three input fields: 'District:' with the value '1000', 'User ID:' with the value '2000', and 'Password:' with masked characters. A red arrow and circled '3' points to the 'District:' label, and another red arrow and circled '4' points to the '1000' value. Below the password field is a 'sign-in' button with a red arrow pointing to it.

- ① **"ReportMax Tools"** The title of a screen or label
- ② **Home** A hyperlink that is clicked with the mouse
- ③ **"District:"** The name of a field on a screen
- ④ **'1000'** The actual value within a field
- ⑤ **[Log In]** A button, check-box, or radio button that is clicked with the mouse (not shown)
- ⑥ **<Enter>** A key on the keyboard (not shown)

Assumptions

This document was written based on the following assumptions:

- All users possess basic computer, internet navigation, and operational skills.
- All users have a valid user ID and password.
- The audience has been trained in their job responsibilities and understands the concept of what is to be accomplished by using ReportMAX™.

This product was developed to be compatible across a variety of operating systems; therefore, some of the screens may look different in regards to input fields and button style. These differences are purely cosmetic and do not affect the operation of ReportMAX™.

Logging In

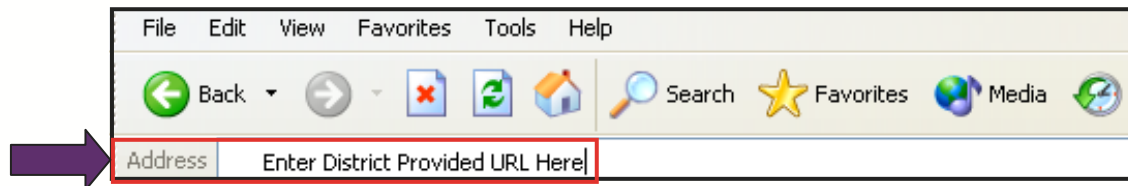
Logging In To ReportMAX™

Step 1:



Double click the Internet Explorer icon on your desktop. If your browser home page has been set to automatically go to the “**ReportMax Tools**” log in screen, proceed to **Step 4**.

Step 2: Enter the following URL in the “Address” field of your browser.



Step 3: Press the <Enter> key and the following screen will appear.

A screenshot of the SchoolMAX ReportMax Tools login page. The page features the SchoolMAX logo and "ReportMax Tools" text on the left, and a "Welcome!" message with the OtisEd logo and "powered by OtisEd" text on the right. Below the logo, there are links for "Home" and "Help". The main content area is titled "Login" and contains three input fields: "District:", "User ID:", and "Password:". Below the input fields is a "sign-in" link with a right-pointing arrow.

Logging In To ReportMAX™ (Continued)



Step 4: You will use your SchoolMAX™ login information to log in to ReportMAX™. To do so, please enter the following:

Enter your "District (#):"

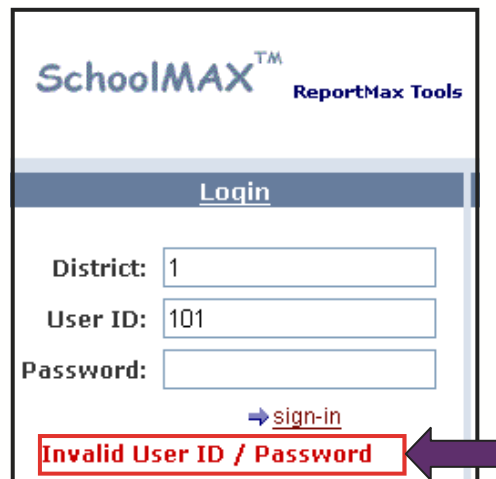
Enter your "User ID:"

Enter your "Password:"



Using your mouse, click on the sign-in link only once!

If you have entered the wrong password, you will receive the message shown below.



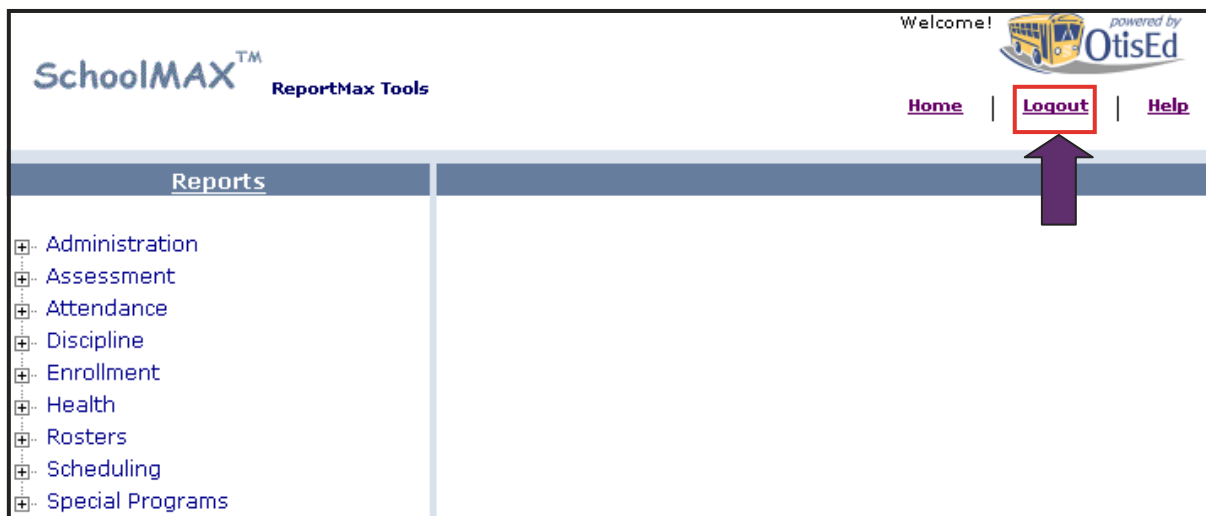
If you receive the message shown above, verify that you have entered the correct information. The "Password:" field is case sensitive. Ensure that the <Caps Lock> key is not on, reenter your password, and click the sign-in link.

Note: Your login information should NEVER be shared with another user/student!

Logging Out

Logging Out Of ReportMAX™

To log out of ReportMAX™, click the **Logout** link located in the upper right-hand corner of any screen. Please make sure to log out using this method. Closing or exiting your browser window does not properly log you out of ReportMAX™.



After clicking the **Logout** link, please make sure that the "Thank you for using ReportMax" message appears. Should you wish to log back in to ReportMAX™, click on the **Return to ReportMax** link as shown below.



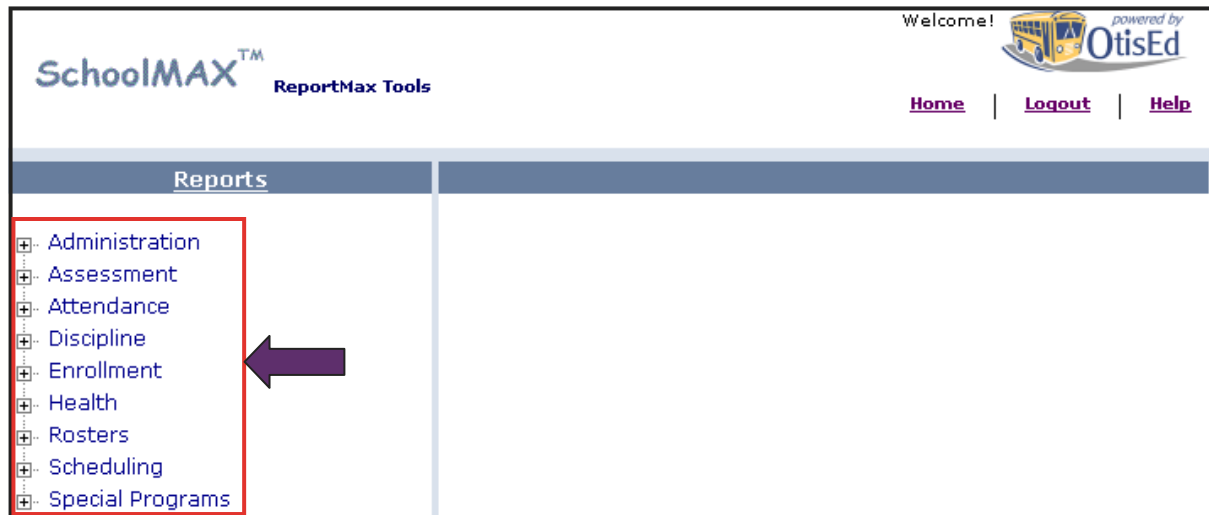
Notes



The ReportMAX™ Main Menu

Using The Main Menu

Once you have logged in to ReportMAX™, the categories of available reports will appear under **Reports** on the left-hand side.



You may click the + sign to expand a category to see the reports available to you. Once you have clicked the + sign it will change to a — sign. You may click the — sign to collapse the category.

Administration Reports

Administration Reporting Options

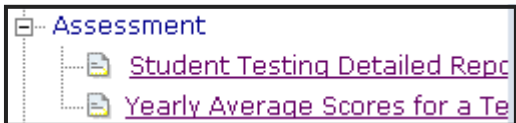


Administration Reports include the following:

- The **Dual Enrollment Report** lists duplicate enrollments for each student and can be generated for an entire district or by individual school.
- The **Duplicate Dwellings** Report lists the duplicate district dwellings with the dwelling numbers identified.
- The **Duplicate Heads of Household** Report lists all of the duplicate heads of a household with the dwelling number and family members listed.
- The **Room List** Report lists the rooms generated by a school or district and includes seat capacity, telephone number, room type, and fee information.
- The **Staff List** Report is a comprehensive list of all staff members.
- The **Withdrawn Students** Report lists withdrawn students and may be generated for an entire district or by individual school. The report allows selection of only students with chosen last location codes.

Assessment Reports

Assessment Reporting Options

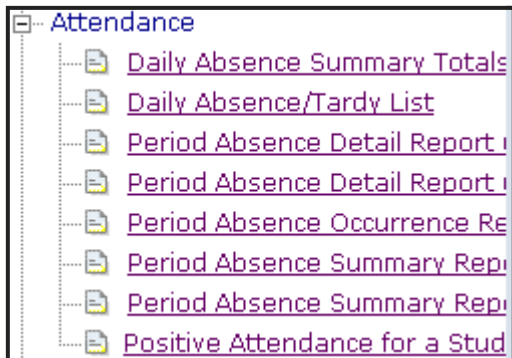


Assessment Reports include the following:

- The **Student Testing Detailed Report** lists all student test scores.
- The **Yearly Average Scores for a Teacher** Report lists the yearly average of test scores, showing trends, and is based on all students who were taught by this teacher. You must select a numeric UOM (average) or there will be an error.

Attendance Reports

Attendance Reporting Options

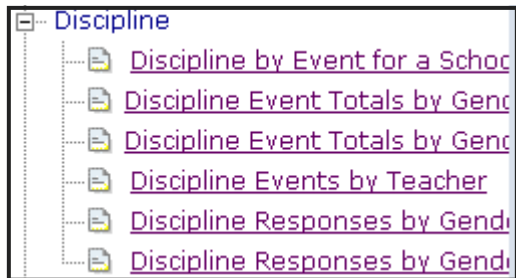


Attendance Reports include the following:

- The **Daily Absence Summary Totals** Report lists the summary totals for absences based on the day or dates chosen and can include reason codes and excuse flags.
- The **Daily Absence/Tardy List** Report lists absences and tardies for the date specified.
- The **Period Absence Detail Report (Date)** lists absences by period with the student name for a specific date.
- The **Period Absence Detail Report (Student)** lists the absence history for a student and includes course/period absences and tardies, reason codes, and excuse flags.
- The **Period Absence Occurrence Report** lists absence occurrences less than or equal to the number entered and can be used for the perfect attendance list (enter a value of 0 for days).
- The **Period Absence Summary Report** is a summary of absences defined by date range and the minimum amount of occurrences and can be filtered by reason codes.
- The **Period Absence Summary Report (Student)** is a summary report by student for period absences that is sorted by a calendar period.
- The **Positive Attendance for a Student and Month** Report is a detailed look at Positive Attendance records for a selected student and month.

Discipline Reports

Discipline Reporting Options

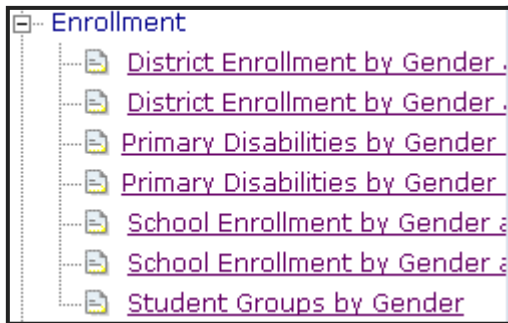


Discipline Reports include the following:

- The **Discipline by Event for a School** Report lists discipline information that is filtered for all or specific events, and includes responses.
- The **Discipline Event Totals by Gender and Ethnicity (SE010)** Report lists discipline events by gender, ethnicity, and LEP.
- The **Discipline Event Totals by Gender and Ethnicity (SP010)** Report lists discipline events by gender, ethnicity, and LEP.
- The **Discipline Events by Teacher** Report lists discipline events and responses for a selected referring teacher, and includes the student's name.
- The **Discipline Responses by Gender and Ethnicity (SE210)** Report lists discipline responses by gender, ethnicity, and LEP.
- The **Discipline Responses by Gender and Ethnicity (SP210)** Report lists discipline responses by gender, ethnicity, and LEP.

Enrollment Reports

Enrollment Reporting Options



Enrollment Reports include the following:

- The **District Enrollment by Gender and Ethnicity (SE010)** Report lists the district enrollment for the selected date by gender, ethnicity, and LEP for all students.
- The **District Enrollment by Gender and Ethnicity (SP010)** Report lists the district enrollment for the selected date by gender, ethnicity, and LEP for all students.
- The **Primary Disabilities by Gender and Ethnicity (SE010)** Report lists the special education roster and includes a list of primary disabilities, gender, and ethnicity for a specified date and provides a total number of students per the student population.
- The **Primary Disabilities by Gender and Ethnicity (SP010)** Report lists the special education roster and includes a list of primary disabilities, gender, and ethnicity for a specified date and provides a total number of students per the student population.
- The **School Enrollment by Gender and Ethnicity (SE010)** Report lists school enrollment by gender, ethnicity, and LEP for all students for a specific date.
- The **School Enrollment by Gender and Ethnicity (SP010)** Report lists school enrollment by gender, ethnicity, and LEP for all students for a specific date.
- The **Student Groups by Gender** Report is a roster of student groups that includes gender.

Health/Rosters Reports

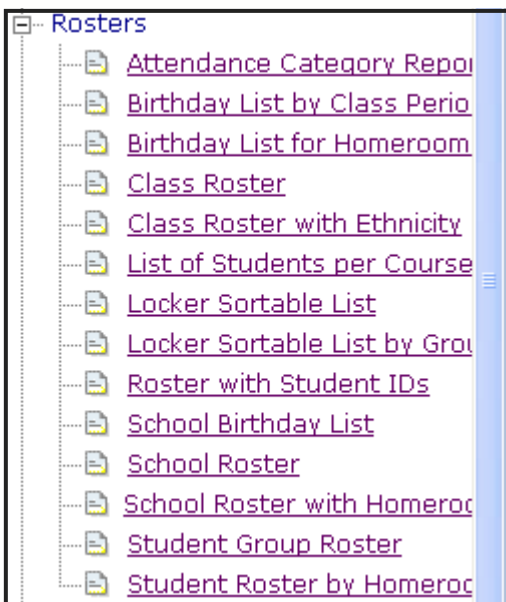
Health Reporting Options



Health Reports include the following:

- The **Student Medications Report** is a list of students who are scheduled to receive medications on the date entered.

Rosters Reporting Options



Rosters Reports include the following:

- The **Attendance Category Report** is a roster of all students in school (with the attendance category noted) that can be limited to a selected grade or all grades and can be sorted by grade.
- The **Birthday List by Class Period** Report lists student birthdays.
- The **Birthday List for Homeroom Teacher** Report is a homeroom teacher roster listing student birthdays.

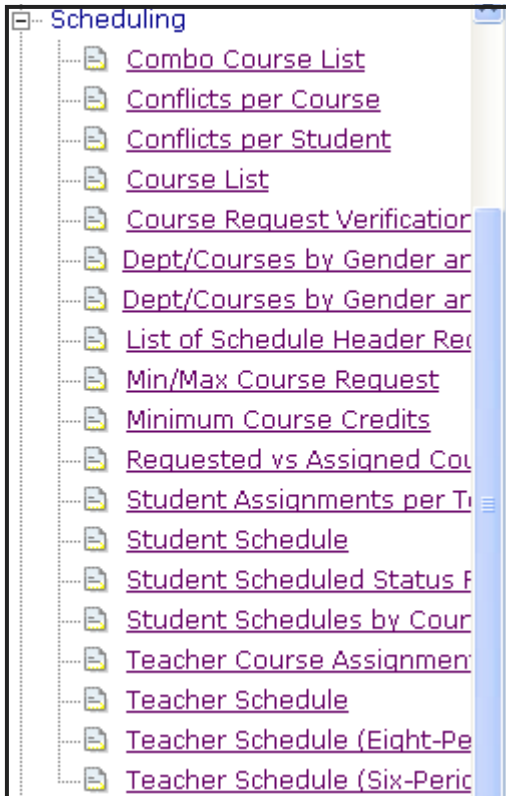
Rosters Reporting Options (Continued)

Rosters Reports include the following:

- The **Class Roster** Report is a roster by period and teacher and includes the student gender.
- The **Class Roster with Ethnicity** Report is a class roster by period and teacher and includes student gender and ethnicity.
- The **List of Students per Course** Report is a course list with all students assigned by section, term, and period.
- The **Locker Sortable List** Report is a sortable grid that lists student locker assignments at a school per student. The grid may be sorted to find a specific student's locker assignment by using the locker number.
- The **Locker Sortable List by Group** Report is a sortable grid that lists student locker assignments at a school per student by group (or all). The grid may be sorted to find a specific student's locker assignment by using the locker number.
- The **Roster with Student IDs** Report is a roster for the entire school (or can be filtered by the grade level) and includes SMAX ID, state ID, testing ID, and/or Social Security Number.
- The **School Birthday List** Report is a roster of all students enrolled in school with a listed birthday.
- The **School Roster** Report is a roster of all enrolled students with their grade level defined.
- The **School Roster with Homeroom Teacher** Report is a roster of all enrolled students with their grade level and homeroom teacher listed.
- The **Student Group Roster** Report is a roster of all student groups.
- The **Student Roster by Homeroom Teacher** Report includes homeroom rosters that are identified by the teacher ID.

Scheduling Reports

Scheduling Reporting Options



Scheduling Reports include the following:

- The **Combo Course List** Report lists all of the courses included in a combination course.
- The **Conflicts per Course** Report lists the conflict count per the course and term.
- The **Conflicts per Student** Report lists the conflicts per student for course requests with the period defined.
- The **Course List** Report lists all of the courses in a catalogue.
- The **Course Request Verification** Report lists the student's course requests with course credit and is used for student/parent verification.
- The **Dept/Courses by Gender and Ethnicity (SE010)** Report lists course and department student assignment totals for gender, ethnicity, LEP, and primary disability.
- The **Dept/Courses by Gender and Ethnicity (SP010)** Report lists course and department student assignment totals for gender, ethnicity, LEP, and primary disability.

Scheduling Reports

Scheduling Reporting Options (Continued)

- The **List of Schedule Header Records** Report lists schedule header records for a specified year.
- The **Min/Max Course Request** Report lists students with less than the minimum or more than the maximum number of course requests designated.
- The **Minimum Course Credits** Report lists all students by year/school/grade who have fewer than a specified total number of credit hours.
- The **Requested vs Assigned Courses** Report is a course list showing totals for all requests versus assignments.
- The **Student Assignments per Teacher** Report lists the number of students assigned to a teacher per period and term with LEP, gender, and ethnic classification.
- The **Student Schedule** Report lists the student schedule.
- The **Student Scheduled Status Report** lists the students with their scheduling status and can be limited to only students with a specific status. This report can be filtered by grade and/or schedule version.
- The **Student Schedules by Counselor** Report lists student schedules and allows sorting of student schedules by counselor and includes the counselor's name.
- The **Teacher Course Assignment Grid** Report is a grid representation of the teacher's assignments for a selected cycle day and term number by period.
- The **Teacher Schedule** Report is a list of teacher schedules in line format.
- The **Teacher Schedule (Eight-Period Matrix)** Report lists the teacher schedule for a selected cycle day and term number by period for a maximum of eight (8) periods.
- The **Teacher Schedule (Six-Period Matrix)** Report lists the teacher schedule for a selected cycle day and term number by period for a maximum of six (6) periods.

Special Programs Reports

Special Programs Reporting Options



Special Programs Reports include the following:

- The **Special Programs for a Selected Student** Report is a list of all special programs for a student and includes program participation begin/end dates.
- The **Special Programs Roster** Report is a roster of all students in school that are in a specified or special program.

Notes



Running A Sample Report

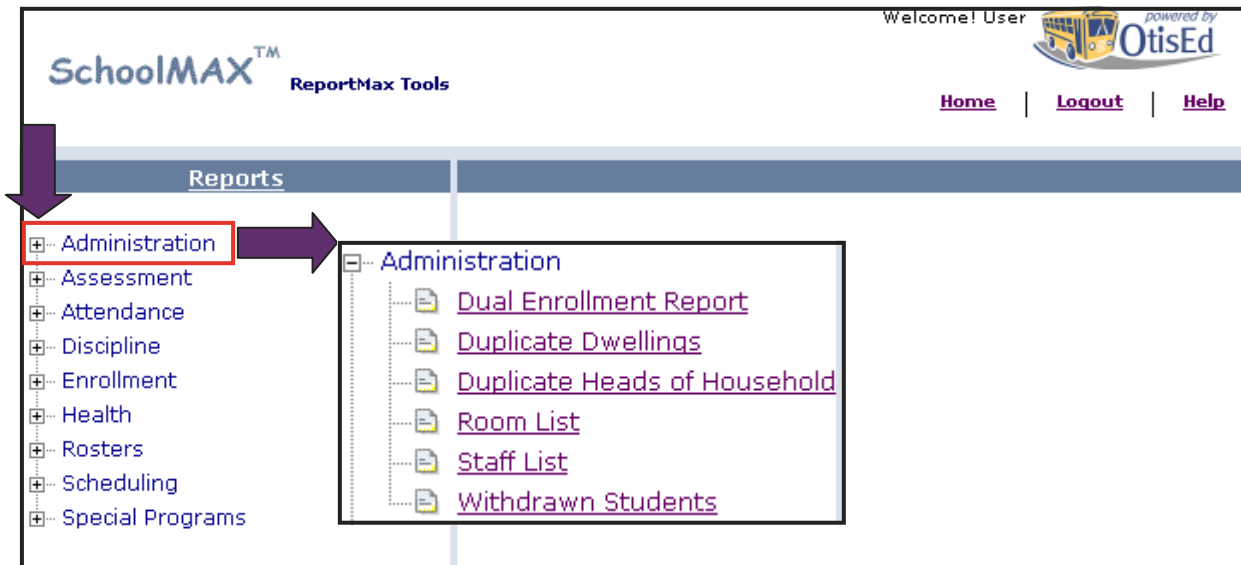
Step-By-Step Procedure For Running An Administration Report

This procedure describes the detailed steps required to run the Administration: “Staff List” Report. This report will be used as an example of how to run any available report within ReportMAX™.

The steps involved in running any other available report will be very similar to those described here; however, the available parameter selections will vary a great deal from one report to the next. For example, the parameter selections available with the “Staff List” Report will differ greatly from those available with a “Course List” Report from Scheduling or an “Absence Occurrence Report” from Attendance.

Running available reports in ReportMAX™ involves the following steps.

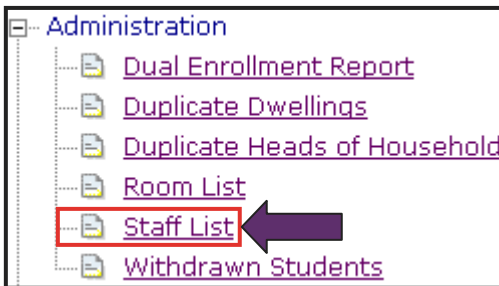
1. Using your mouse, point to the + sign to the left of one of the categories as shown below. Click the + sign to expand the selected category. The + sign will change to a — sign. You may click the — sign to collapse the category.



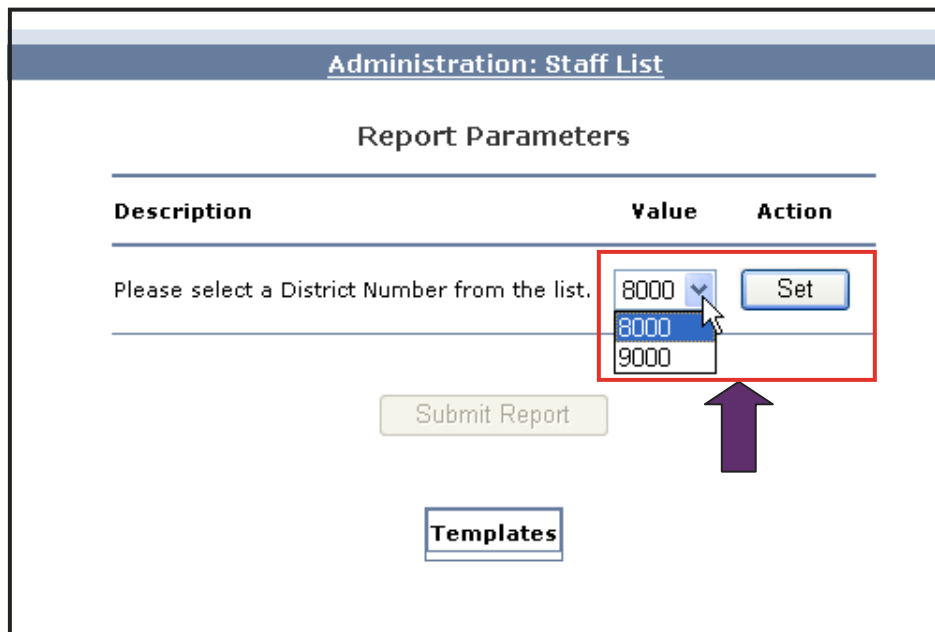
Running A Sample Report

Step-By-Step Procedure For Running An Administration Report (Continued)

2. After a category has been expanded as shown below, click the report you wish to run.



3. After doing so, the first "Report Parameters" screen will display and you will be required to enter the value for the first parameter. In the example shown below, select a "District Number" from the drop-down list box and then click the [Set] button to continue.



A screenshot of the "Administration: Staff List" report parameters screen. The title bar reads "Administration: Staff List". Below the title bar, the text "Report Parameters" is centered. A table with three columns: "Description", "Value", and "Action" is displayed. The "Description" column contains the text "Please select a District Number from the list.". The "Value" column contains a drop-down menu with three options: "8000", "8000", and "9000". The "Action" column contains a "Set" button. A red rectangular box highlights the drop-down menu and the "Set" button. A purple arrow points to the "Set" button from below. Below the table, there is a "Submit Report" button and a "Templates" button.

Description	Value	Action
Please select a District Number from the list.	8000 8000 9000	Set

Running A Sample Report

Step-By-Step Procedure For Running An Administration Report (Continued)

4. A second “**Report Parameter**” screen will display prompting you to select one or more “School Numbers” from the list. After you select your school(s), click the [**Set**] button to continue.

Description	Value	Action
Please select a District Number from the list.	8000	<input type="button" value="Change"/>
Please select one or more School Numbers from the list.	<<All>> 1 100 1000	<input type="button" value="Set"/>

Running A Sample Report

Step-By-Step Procedure For Running An Administration Report (Continued)

5. After your school(s) have been selected and “set” on the previous page, the next “**Report Parameters**” screen will display. You will now need to enter a selection for the third report parameter for this report. Then, click the [Set] button to continue.

Administration: Staff List

Report Parameters

Description	Value	Action
Please select a District Number from the list.	8000	<input type="button" value="Change"/>
Please select one or more School Numbers from the list.	'100'	<input type="button" value="Change"/>
Please select one or more Staff Types from the list	<<All>> Teacher	<input type="button" value="Set"/>

Running A Sample Report

Step-By-Step Procedure For Running An Administration Report (Continued)

6. If you need to change any of the parameter selections you have made, click the appropriate **[Change]** button. After ensuring that all of your report parameter selections are correct, click the **[Submit Report]** button to continue.

Administration: Staff List		
Report Parameters		
Description	Value	Action
Please select a District Number from the list.	8000	<input type="button" value="Change"/>
Please select one or more School Numbers from the list.	'100'	<input type="button" value="Change"/>
Please select one or more Staff Types from the list	'Teacher'	<input type="button" value="Change"/>

Templates

Notes



Saving A Report Template

Step-By-Step Procedure For Saving A Report Template

1. Once you complete the process of selecting the Report Parameters for a specific report, you may choose to save those choices for future use if you intend to run the same exact report at a future date. To do so, enter a name for your report (e.g., "Staff List #1") in the box below on the left-hand side. Then, click the [**Save As Template**] button to continue.

Administration: Staff List

Report Parameters

Description	Value	Action
Please select a District Number from the list.	8000	Change
Please select one or more School Numbers from the list.	'100'	Change
Please select one or more Staff Types from the list	'Teacher'	Change

[Submit Report](#)

Templates

[Save As Template](#)

Saving A Report Template

Step-By-Step Procedure For Saving A Report Template (Continued)

2. Once your Report Template has been saved, it should appear in the drop-down list box highlighted in the first box at the bottom of this screen. Ensure that the 'Template Saved' message appears. Once you have completed this process, you will now be able to select any saved template by clicking on the [Load] button.

Administration: Staff List

Report Parameters

Description	Value	Action
Please select a District Number from the list.	8000	<input type="button" value="Change"/>
Please select one or more School Numbers from the list.	'100'	<input type="button" value="Change"/>
Please select one or more Staff Types from the list	'Teacher'	<input type="button" value="Change"/>

Templates

Staff List #1

Staff List #1

Template Saved

Saving/Printing A Sample Report

Step-By-Step Procedure For Saving/Printing A Sample Report

1. After completing Step #6 on page 26, the report will display as shown below. You may click the **PRINTER FRIENDLY VERSION** link to print this report.

Administration: Staff List

PAGE 1 PRINTER FRIENDLY VERSION EXPORT 2 PAGES ZOOM 100%

ReportMAX Staff List Sch

District: 8000 Test District
School: 100 100 Elementary Report Date: :
Staff Type: T Teacher

Dept	Staff Name	Emp #	Asgn Code	Asgn %	Role ID	Begin Asgn Dt	End Asgn Dt	Yrs at Asgnm
	AGEE, BARBARA	1002	2180	100	12	08/30/2001		3.1
	AGUILAR, JENNIFER	1003	1002	100	12	08/30/2001	08/07/2003	1.9
	ALIOSHIN, ANNETTE	1004	1002	100	12	08/30/2001	06/30/2002	0.8
	ANDERSON, GAYLENE	1005	1002	100	12	08/30/2001		3.1
	BALL, BETTY	1007	1002	100	12	08/30/2001		3.1
	BLANKENSHIP, NANCY	1017	1003	100	12	08/30/2001		3.1
	BRADLEY, ERIN	1018	1015	100	12	08/30/2001		3.1
	BUCHANAN, KATHRYNE	1023	3000	100	12	08/30/2001	06/30/2002	0.8
	BURKE, MOIRA	1214	1001	20	12	08/30/2001	06/28/2002	0.8

Saving/Printing A Sample Report

Step-By-Step Procedure For Saving/Printing A Sample Report (Continued)

2. If you wish to save the report, click the [Save a Copy] button as shown below.

The screenshot shows a web browser window displaying a report titled "Staff List". The browser's address bar shows the URL: `http://smaxtest/reportmax/thinwrapper.aspx?SaCmdName=ExecXML&SaSubCmdName=...`. The browser's toolbar includes a "Save a Copy" button, which is highlighted with a red box and a purple arrow. The report content includes the following information:

ReportMAX SchoolMAX™

District: 8000 Test District
School: 100 100 Elementary
Report Date: 10/13/2004

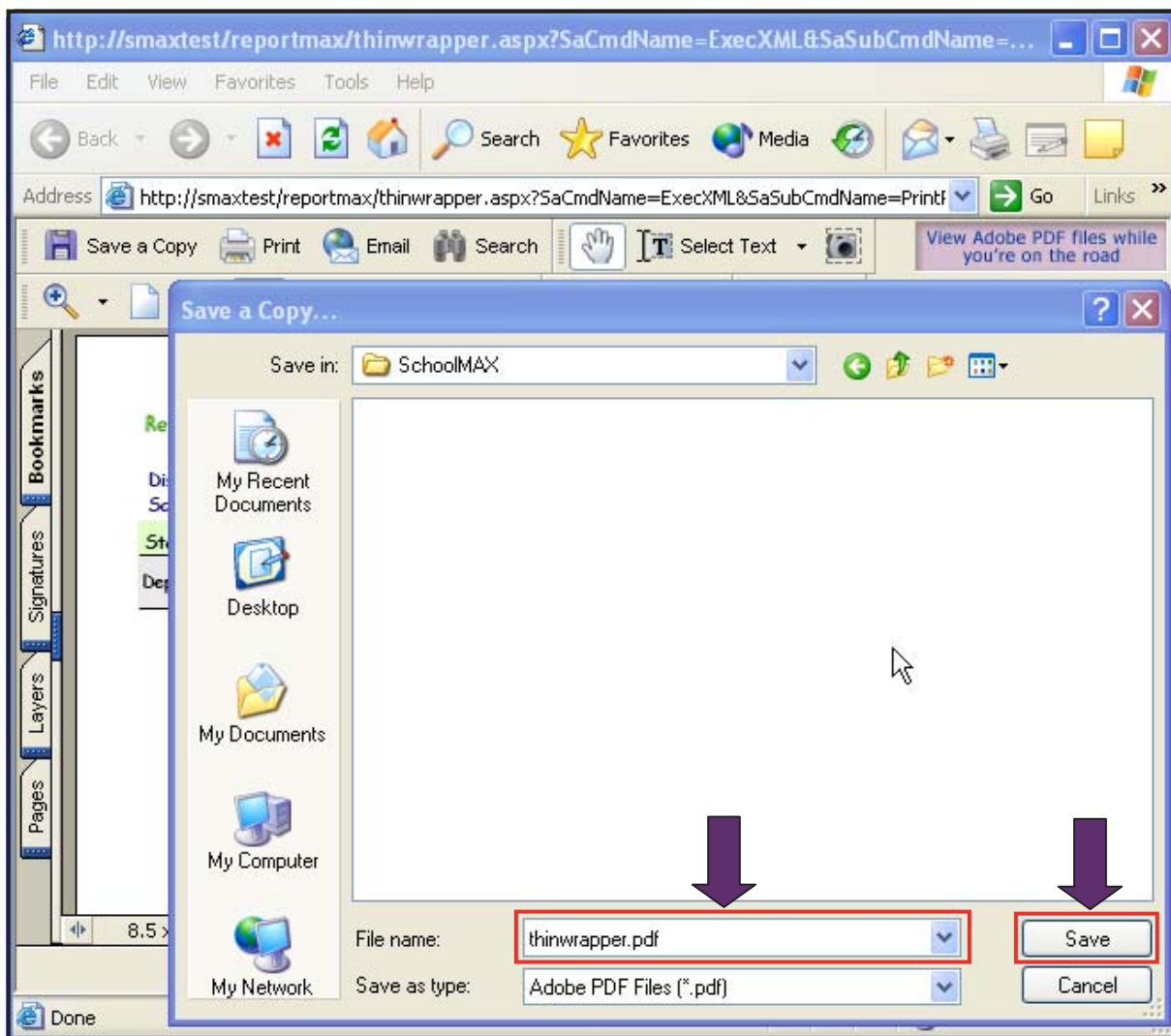
Staff Type: T Teacher

Dept	Staff Name	Emp #	Asgn Code	Asgn %	Role ID	Begin Asgn Dt	End Asgn Dt	Yrs at Asgnmt	Yrs Curr District
	AGEE, BARBARA	1002	2180	100	12	08/30/2001		3.1	
	AGUILAR, JENNIFER	1003	1002	100	12	08/30/2001	08/07/2003	1.9	
	ALIOSHIN, ANNETTE	1004	1002	100	12	08/30/2001	06/30/2002	0.8	4
	ANDERSON, GAYLENE	1005	1002	100	12	08/30/2001		3.1	
	BALL, BETTY	1007	1002	100	12	08/30/2001		3.1	
	BLANKENSHIP, NANCY	1017	1003	100	12	08/30/2001		3.1	
	BRADLEY, ERIN	1018	1015	100	12	08/30/2001		3.1	9
	BUCHANAN, KATHRYNE	1023	3000	100	12	08/30/2001	06/30/2002	0.8	4
	BURKE, MOIRA	1214	1001	20	12	08/30/2001	06/28/2002	0.8	7
	BURNHAM, PHYLLIS	1026	1001	100	12	08/30/2001		3.1	14

Saving/Printing A Sample Report

Step-By-Step Procedure For Saving/Printing A Sample Report (Continued)

3. Once the “**Save a Copy...**” screen displays, you may accept the default file name (or rename the file name to something more meaningful) to save the document as a **.pdf** file. Then, click the [**Save**] button to continue.



Saving/Printing A Sample Report

Step-By-Step Procedure For Saving/Printing A Sample Report (Continued)

- You may view your report by clicking the .pdf file that was created on the previous page. To do so, click the file and the following screen will display.

The screenshot shows the Adobe Acrobat interface with a PDF document open. The document content includes the following information:

ReportMAX **SchoolMAX™**

Staff List

District: 8000 Test District
 School: 100 100 Elementary Report Date: 10/13/2004

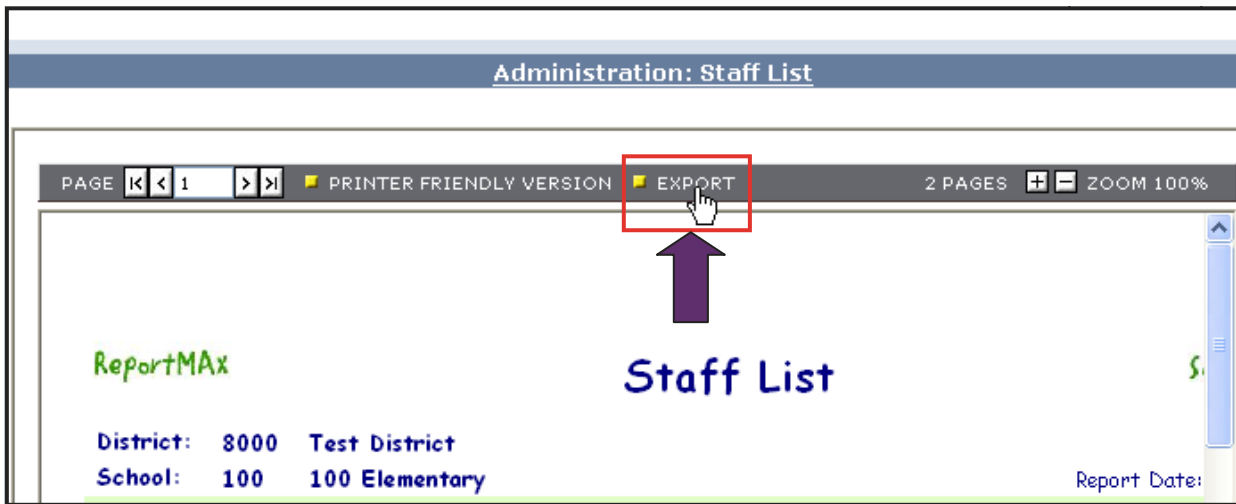
Staff Type: T Teacher

Dept	Staff Name	Emp #	Asgn Code	Asgn %	Role ID	Begin Asgn Dt	End Asgn Dt	Yrs at Asgmt	Yrs Curr District
	AGEE, BARBARA	1002	2180	100	12	08/30/2001		3.1	
	AGUILAR, JENNIFER	1003	1002	100	12	08/30/2001	08/07/2003	1.9	
	ALIOSHIN, ANNETTE	1004	1002	100	12	08/30/2001	06/30/2002	0.8	4
	ANDERSON, GAYLENE	1005	1002	100	12	08/30/2001		3.1	
	BALL, BETTY	1007	1002	100	12	08/30/2001		3.1	
	BLANKENSHIP, NANCY	1017	1003	100	12	08/30/2001		3.1	
	BRADLEY, ERIN	1018	1015	100	12	08/30/2001		3.1	9
	BUCHANAN, KATHRYNE	1023	3000	100	12	08/30/2001	06/30/2002	0.8	4
	BURKE, MOIRA	1214	1001	20	12	08/30/2001	06/28/2002	0.8	7
	BURNHAM, PHYLLIS	1026	1001	100	12	08/30/2001		3.1	14
	CALHOUN, SANDY	1456	100	100	12	11/01/2002	06/30/2003	0.7	
	CANDEE, NANCY	1028	1015	100	12	08/30/2001		3.1	
	CHRISTENSEN, JEAN	1032	2180	100	12	08/11/2003		1.2	8
	CORCORAN, JANICE	1030	1015	100	12	08/30/2001	06/30/2002	0.8	
	DEVEREUX, KATHRYN	1054	1015	100	12	08/30/2001	06/30/2002	0.8	
	ECHEVERRIA, SHEILA	1058	1001	100	12	08/30/2001		3.1	
	FERRERO, LOREN	1066	2580	100	12	08/30/2001		3.1	
	GARCIA, JO ANNE	1072	2180	100	12	08/30/2001	06/30/2002	0.8	8
	GARCIA, MARIA	1071	2180	100	12	08/30/2001	06/14/2002	0.8	10
	GARRISON, KAREN	1076	1001	100	12	08/30/2001		3.1	
	GIRIMONTE, SUSAN	1077	1003	100	12	08/30/2001	06/30/2002	0.8	
	HARRISON, NANCY	1090	1003	100	12	08/30/2001		3.1	
	HASKINS, NANCY	1092	1003	100	12	08/30/2001	06/30/2002	0.8	

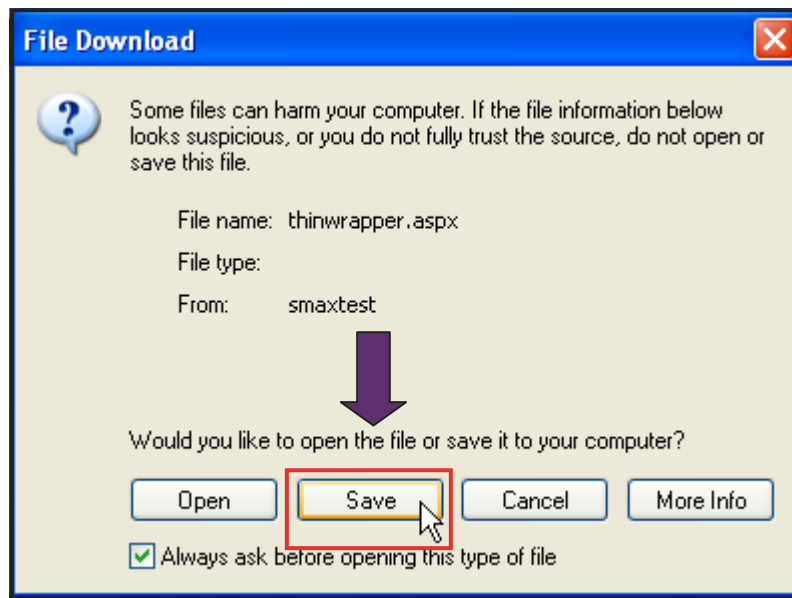
Exporting A Sample Report

Step-By-Step Procedure For Exporting A Sample Report

1. If you wish to export a report to a file, click the **EXPORT** link as shown below.



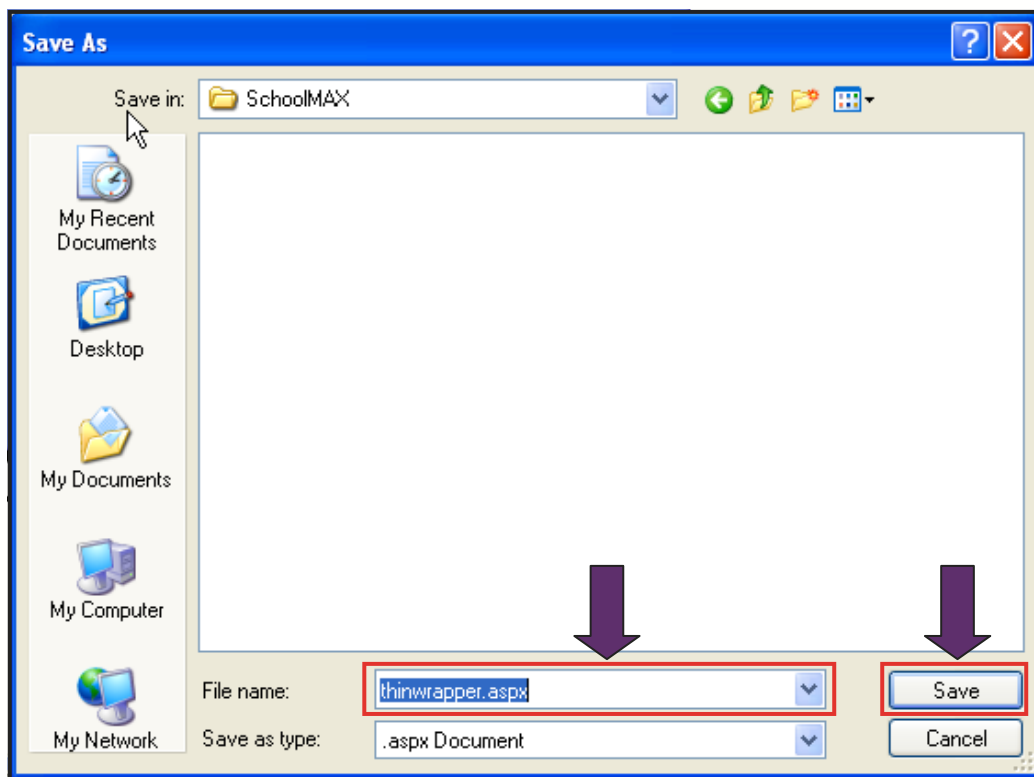
2. After doing so, the "File Download" screen will appear. Click the [Save] button to save the file to your computer.



Exporting A Sample Report

Step-By-Step Procedure For Exporting A Sample Report (Continued)

3. Once the “**Save As**” screen appears you may save the export file from ReportMAX™. The file will be saved as '<filename>.aspx.' After saving the output file, rename the file to a name that is meaningful and change the file extension to **.csv** (comma-separated value). After doing so, the file should open within Microsoft™ Excel.



Notes

