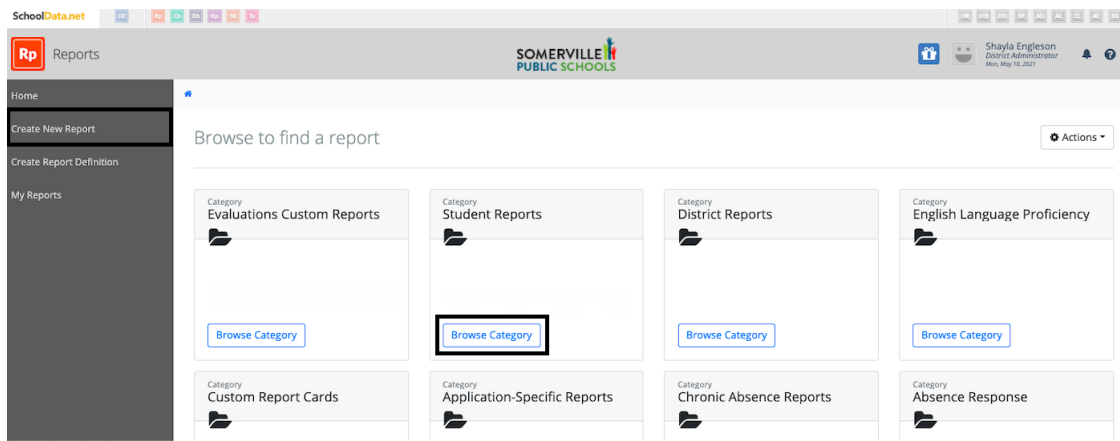


How to Schedule a Report



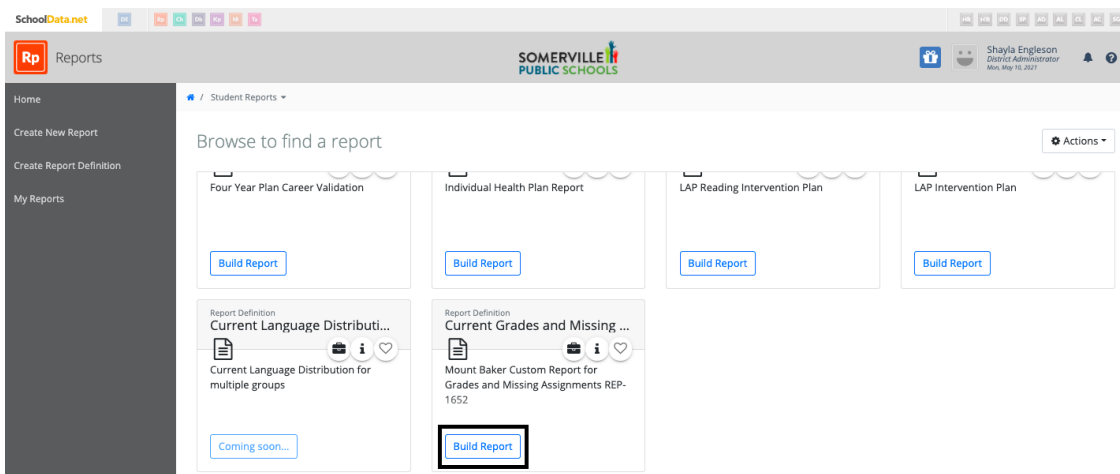
Within the reports application you have the ability to schedule reports to be delivered to a specific user or a group of users. The user receives an in-app and email notification to download the report(s) directly. A report can be scheduled for different occurrences to meet your needs.

First, locate the reports application. If you are in the Homeroom application, you will want to look at the top right near the browser for the different application bundles. Next find the Reports application in the list of apps and then click the 'Learn More' button. Once in the Reports application, you will see the menu on the left side of the screen. Select 'Create New Report'.



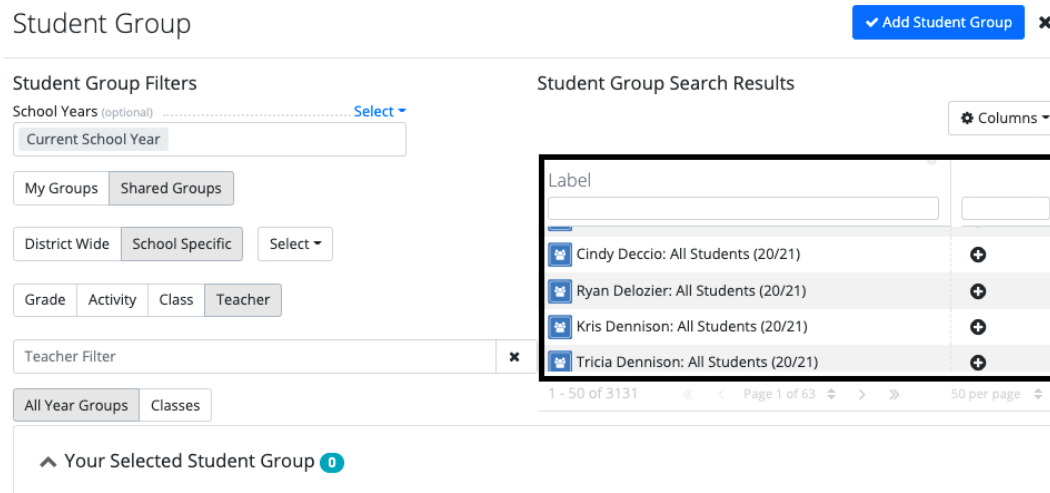
Depending on your purpose, you will see a variety of options. Generic and district specific reports are both stored in these folders. For example, the 'Student Reports' folder.

Within the 'Student Reports' folder there are different reports available for selection. Use the 'Build Report' button to begin.

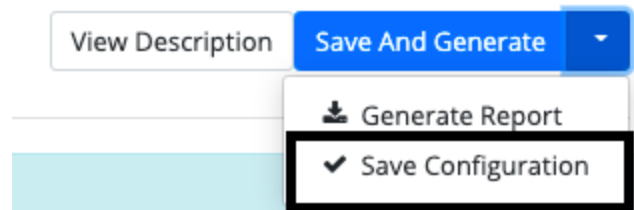


Next, you will see the ability to select different students, or student groups for the report. We have the ability to select either an individual student or access different student groups. For instance, we can select a group by class period, grade level or an entire school. You also have the ability to add and access custom groups you have created within the Homeroom Dashboards or Student Groups applications. You can access both static and smart groups that you may have created or were shared with you.

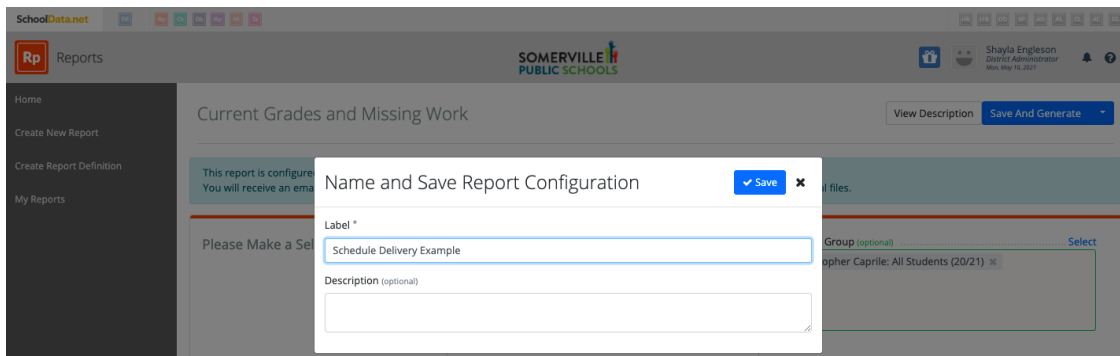
In the example below, we are looking for a single teacher and all of their students.



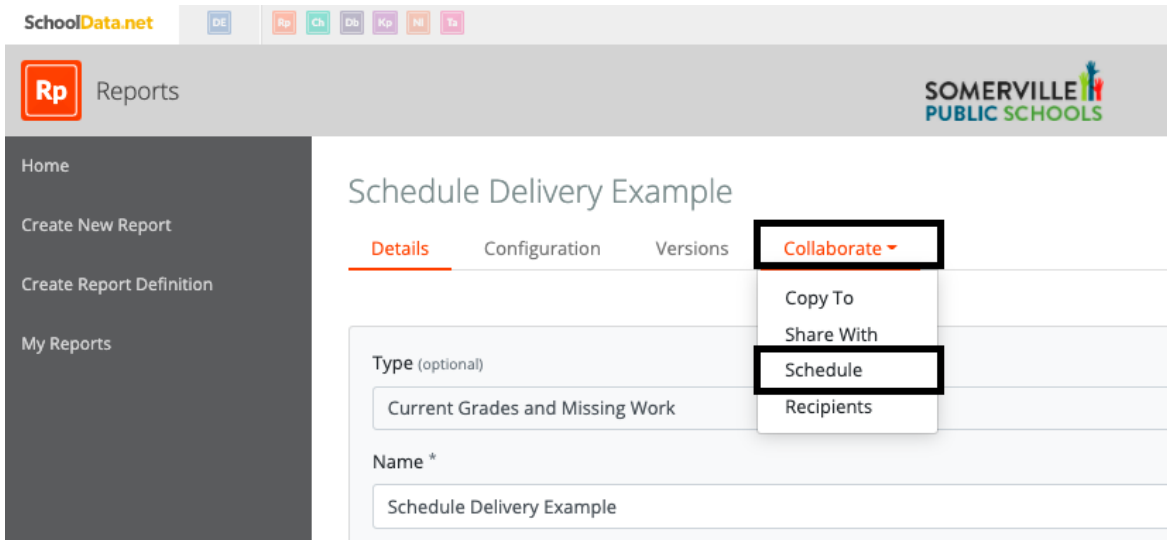
Once you have selected the desired student group, you will click on the “Save Configuration’ button.



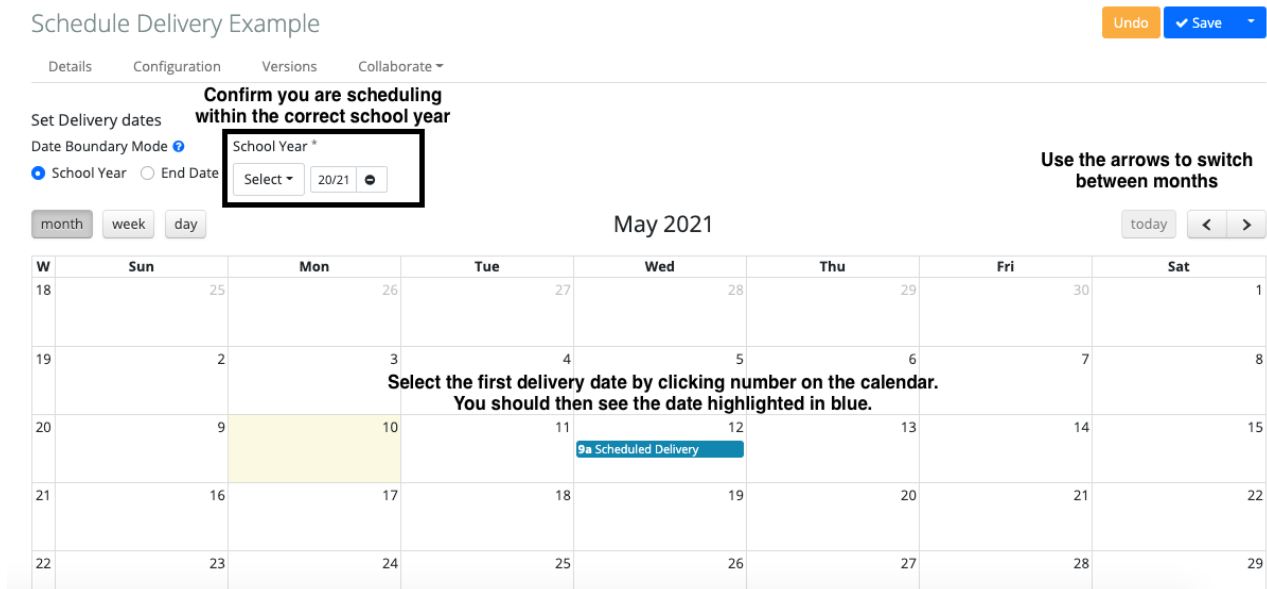
Next, name your report in the label field and click the blue ‘Save’ button.



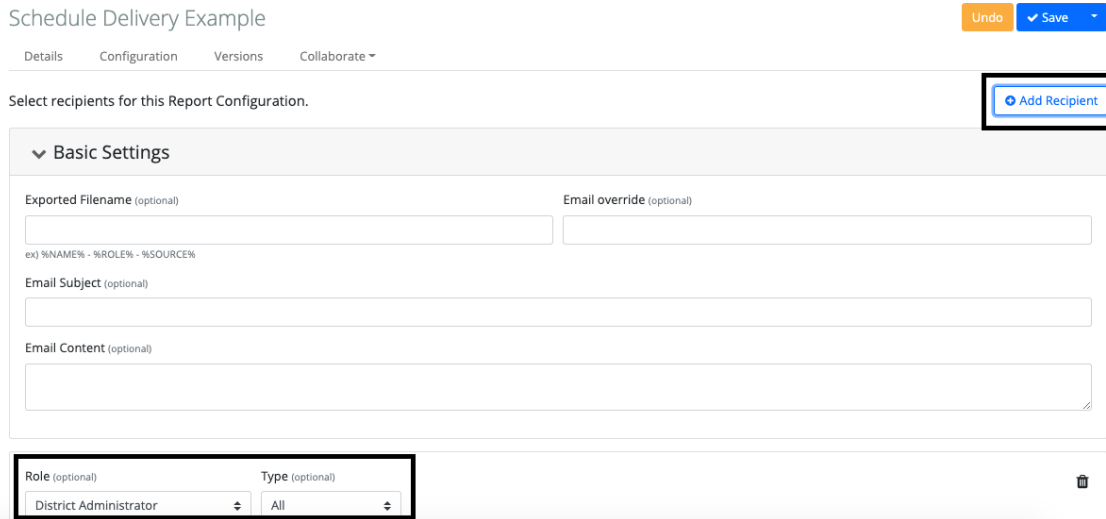
Then, use the 'Collaborate' tab to select the 'Schedule' option.



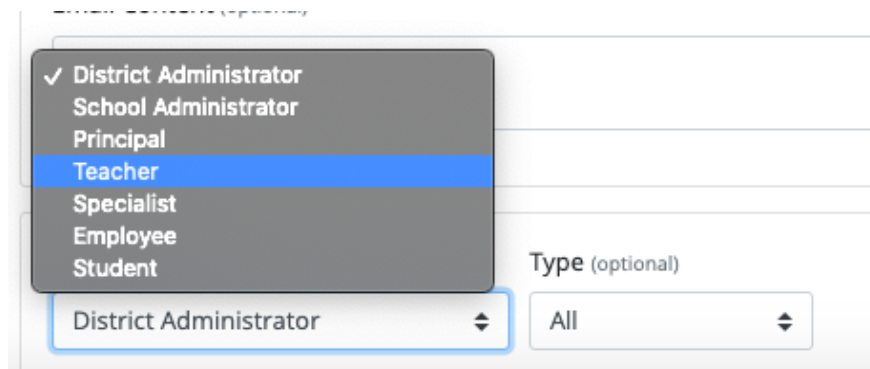
Click a date on the calendar that you would like the first delivery to occur on. Continue to click any other dates you may want this to be delivered. The application will allow you to select more than one date. Then, click 'Save and Continue'.



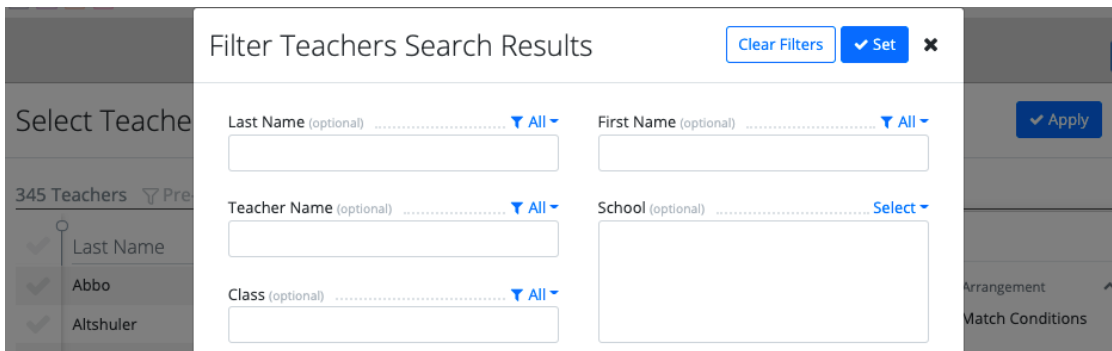
Use the 'Add Recipient' button, and view the selector at the bottom of the screen. Select from the different types of Roles.



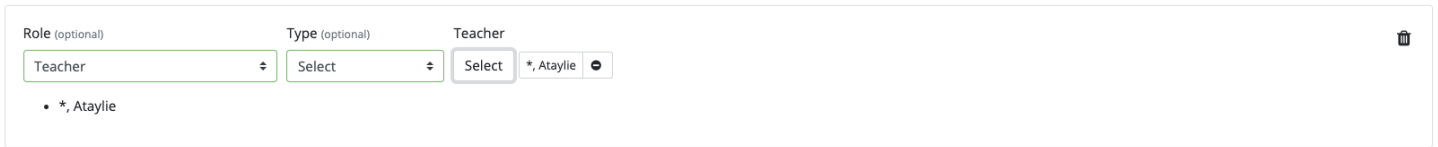
In the example below, I have used the drop down menu to select 'Teachers'. Then, change the 'Type' to select.



Use the 'Select' button to open the Teacher search and select which Teacher you are scheduling this report for. Since this example used a specific Teacher and their students you will want to select that same Teacher. In the upper right of the Teacher search, there is a gear icon where you can select 'Filter on Match Condition'. From there you can narrow down your selection by typing in a first or last name.



Once you have selected the intended recipient(s), you will see their name under the drop down menu. There is also an option to delete a user if necessary.



The screenshot shows a form with three sections: 'Role (optional)' with a dropdown menu set to 'Teacher', 'Type (optional)' with a dropdown menu set to 'Select', and 'Teacher' with a dropdown menu set to '*, Ataylie'. Below the 'Teacher' dropdown, a list of users is visible, including '*, Ataylie'. A trash icon is located in the top right corner of the form.

Use the blue “Save” button to save your scheduling of the report. If you would like to edit, delete or view the report, you can use the ‘My Reports’ tab to surface each report.

