Fall 2006

STI *Information*NOW Reporting Portal

User Manual

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This document was last modified on September 19, 2006. Any subsequent changes made to the STI applications described herein will be discussed in the release notes that accompany each product's update.

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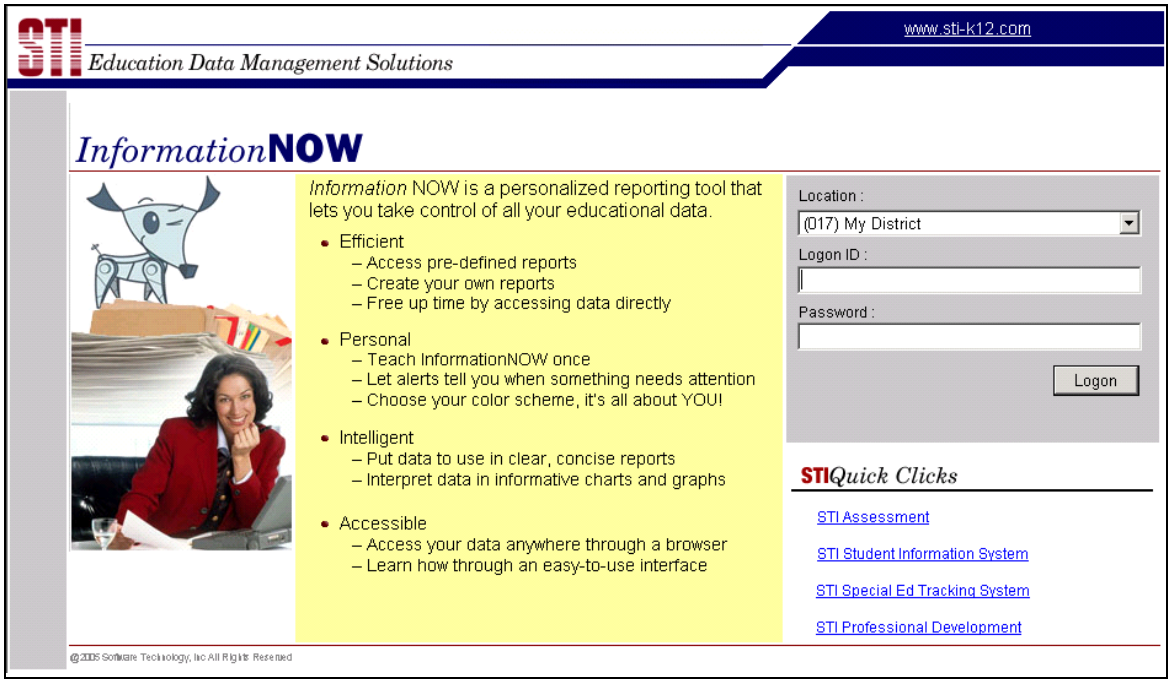
Accessing the Program

Logging On to *Information*NOW Reporting Portal

To access the features of the *Information*NOW Reporting Portal system, you must first log on to the program.

Choose your *Location* from the drop-down list and then enter your *Logon ID* and *Password*. This should be the same ID and password you use in STIOffice or STIDistrict. If you are a member of the *Admin* Group in STIDistrict, you will have administrative security access to *Information*NOW.

Click the **Logon** button when you are ready.



Logging Out

You may log out anytime during your session. To log out, simply click the **logout** link located on the menu bar in the upper right corner of the screen.

*Information*NOW Reporting Portal Overview

Features

The *Information*NOW Reporting Portal provides instant access to the information you need when you need it, without requiring multiple applications. Here are a few of the features included with *Information*NOW:

- The ability to choose the report you need most from a list of pre-configured report templates. *Information*NOW Reporting Portal includes an easy-to-use report manager that lets you create customized reports from the report templates.
- The ability to monitor activity with the *Alert Manager*. With this tool, you can spot trends, from attendance to grades, before potential problems arise.
- The ability to utilize STI applications automatically to access the information you need.

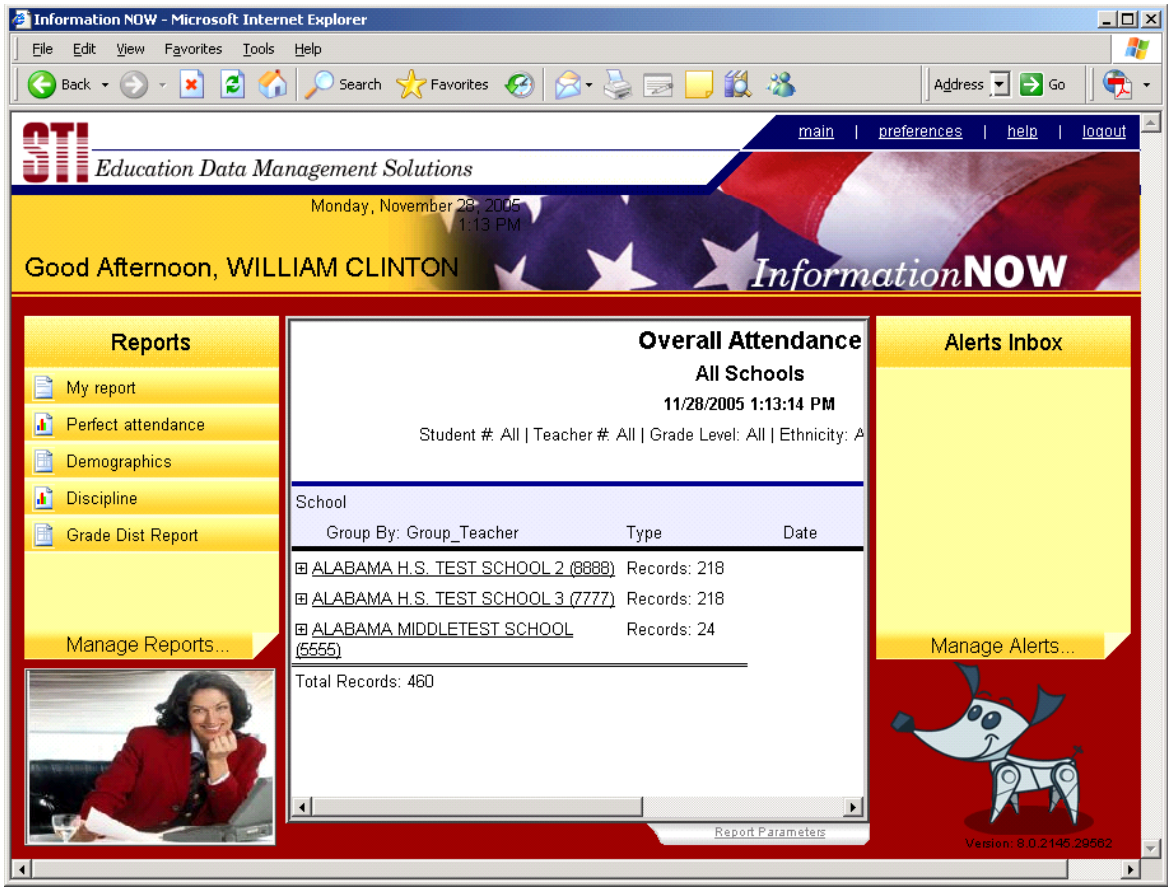
Graphical User Interface

The *Information*NOW Reporting Portal operates within the Internet Explorer browser (IE 6.0 or higher) environment. It's as easy as visiting a favorite Web site.

After logging on to *Information*NOW Reporting Portal, you are presented with the main screen. All report management, alert management, preferences, help features and the system logout is only one click away from this screen.

The screen is divided into three main sections. In the middle is your most used report. This report refreshes each time you launch *Information*NOW Reporting Portal. On the left is the list of your preferred reports, created from the report templates. The right side of the screen gives you instant access to any alerts you have set up.

The look of the page may be configured to a variety of themes, including seasonal, school colors, mascots and photos.



Installation Requirements

Minimum System Requirements

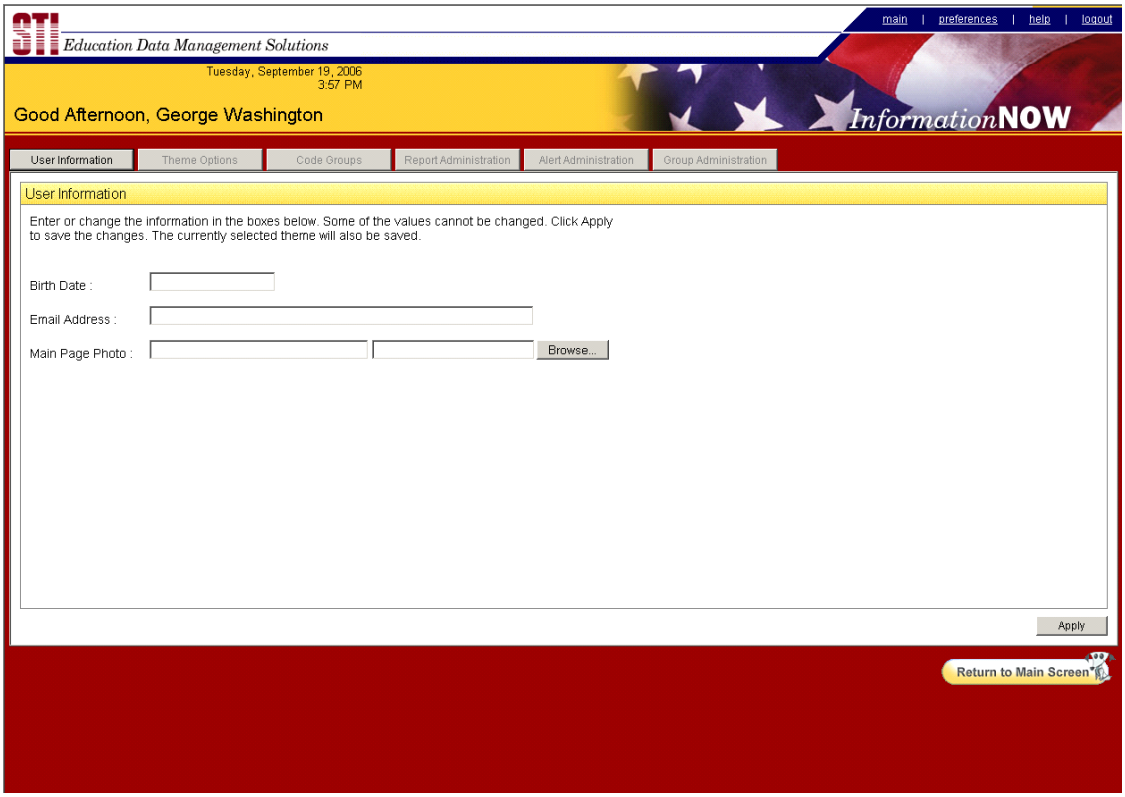
The components required for installation of *Information*NOW Reporting Portal are:

- Internet Explorer 6.0 or higher
- IIS – Windows 2000 SP4 or higher
- .NET – Framework 1.1
- SQL – server reporting services SP1 or higher
- MS reporting services
- The *Information*NOW Reporting Portal application
- STI applications

Setting Preferences

Preferences Screen

When you click the **preferences** link from the home page, the preferences page will display, as shown below. From this page you may set up user information, select theme options, assign code groups, set up report and alert preferences or allow and restrict access to reports and alerts. These features are available within the corresponding tabs onscreen.



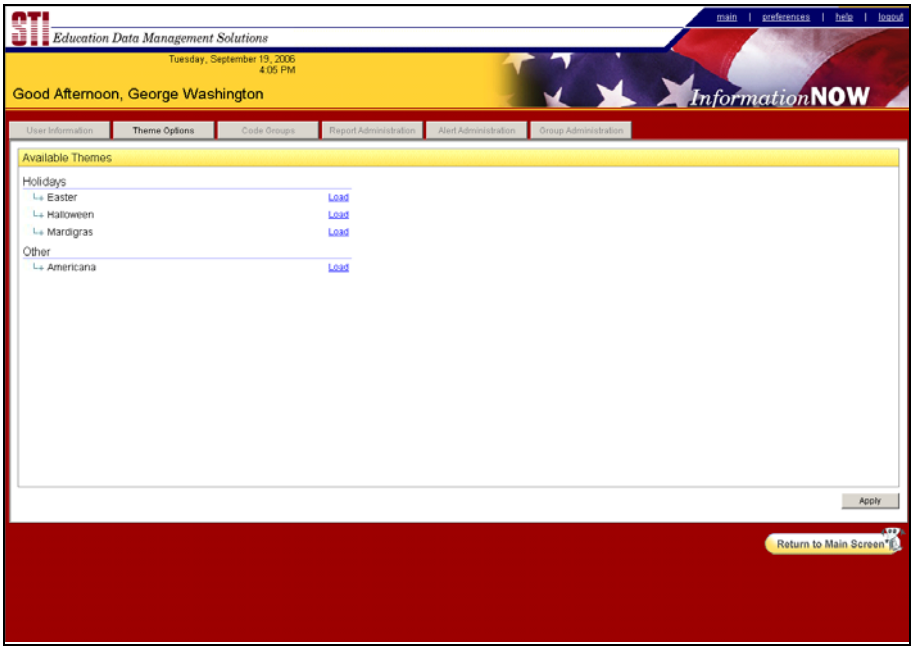
User Information Tab

Here you may personalize your interaction with *Information*NOW Reporting Portal. You may enter your birth date and your e-mail address, and you may also select the home page photo that appears when you log on. Click the **Browse** button and search your hard drive for the photo you wish to select.

After you've entered the information, click the **Apply** button. The next time you log on, you will see your changes.

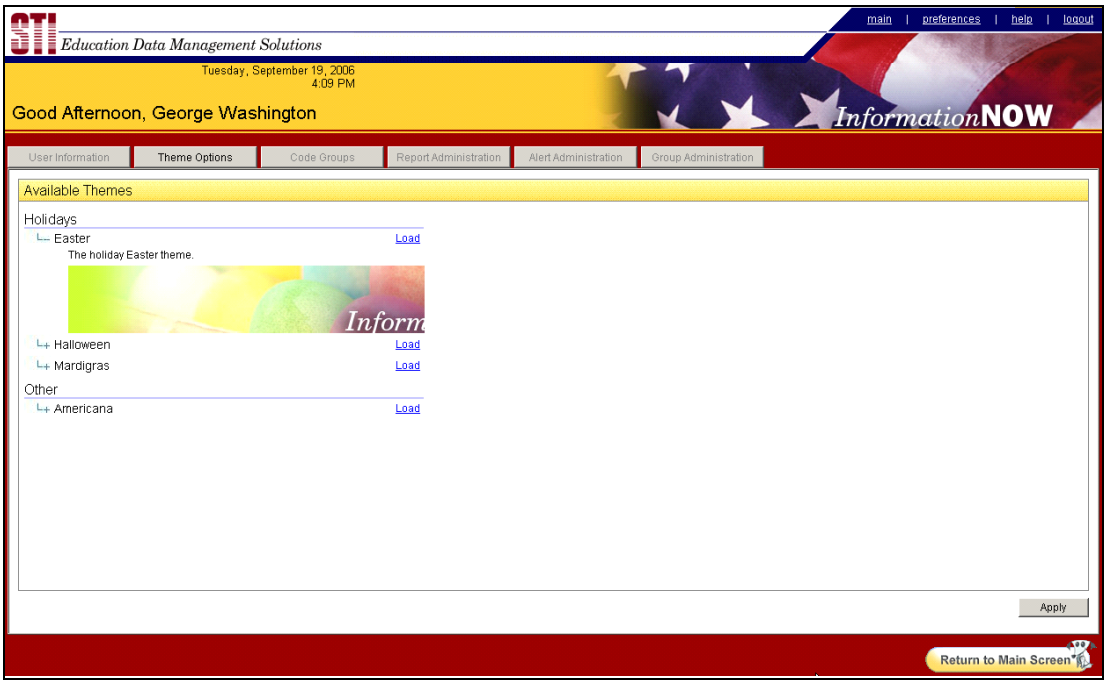
Theme Options Tab

Click the *Theme Options* tab on the preferences page. You will be provided with a list of themes to choose from to set up your *Information*NOW Reporting Portal background. Each theme also features a preview thumbnail that you may look at to help you choose.



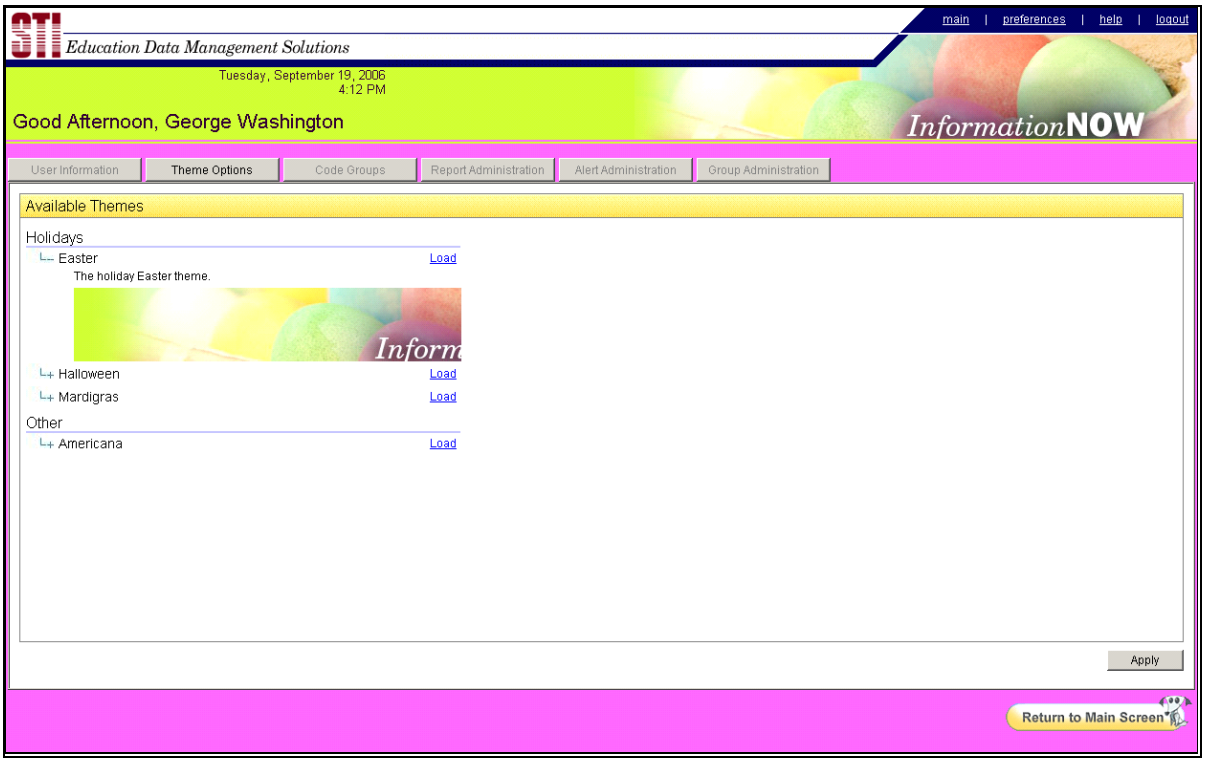
Step 1

In the *Theme Options* tab, click the plus (**+**) sign next to the theme to view the thumbnail.



Step 2

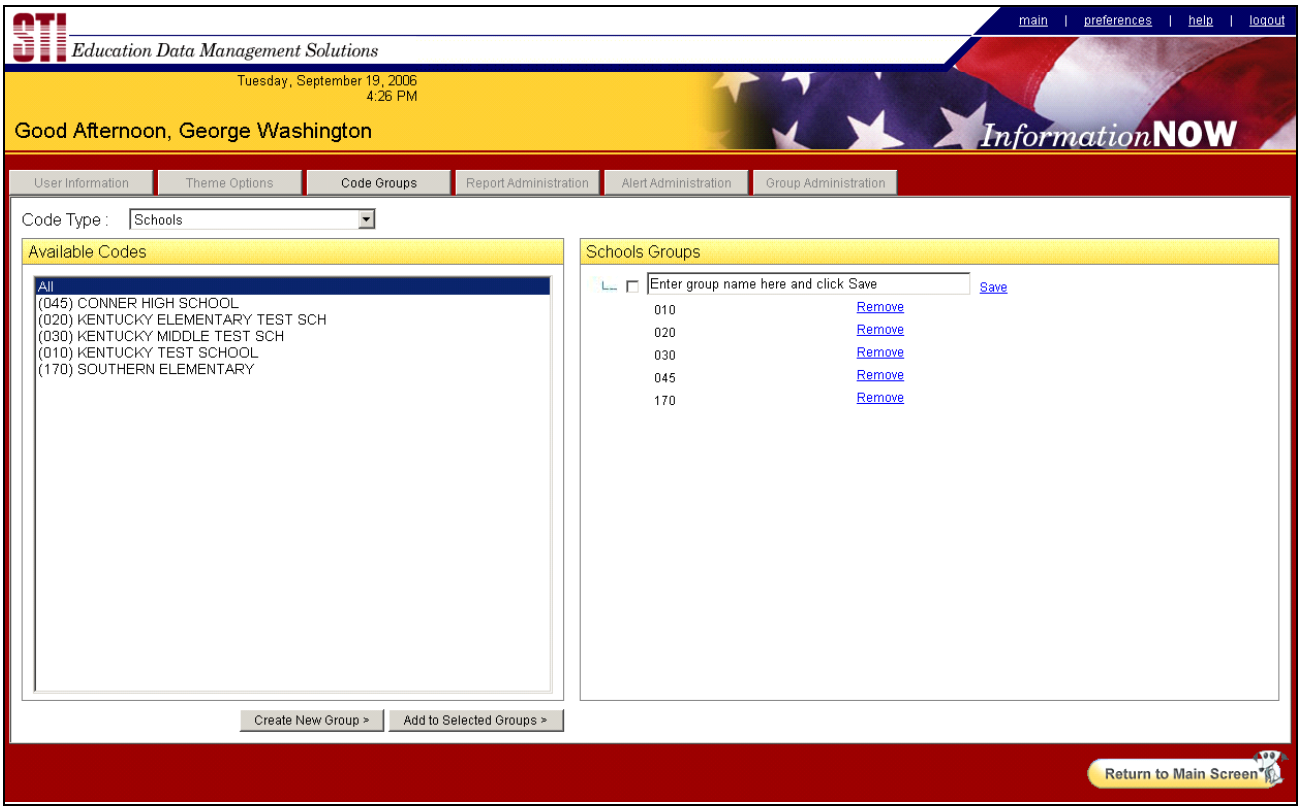
When you find the theme you want, click the **Load** link next to it and your new background theme will appear on your Web pages.



Note: Contact STI Professional Services for information about adding custom themes.

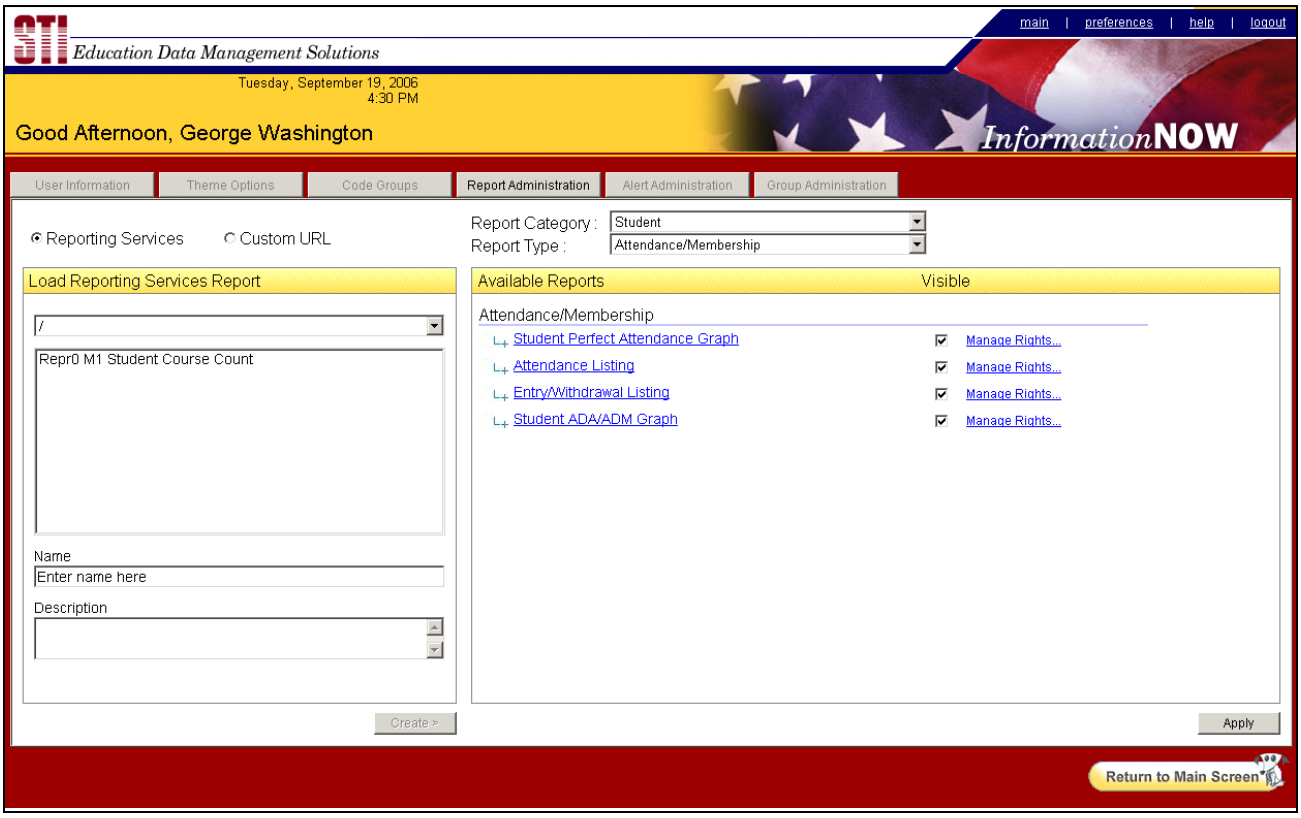
Code Groups Tab

On this tab, you may assign available codes to groups. Groups may be used as selection parameters for report and alert templates. You may also create new groups and assign codes to them. In the example shown below, a new group was created and two codes were added to the group:

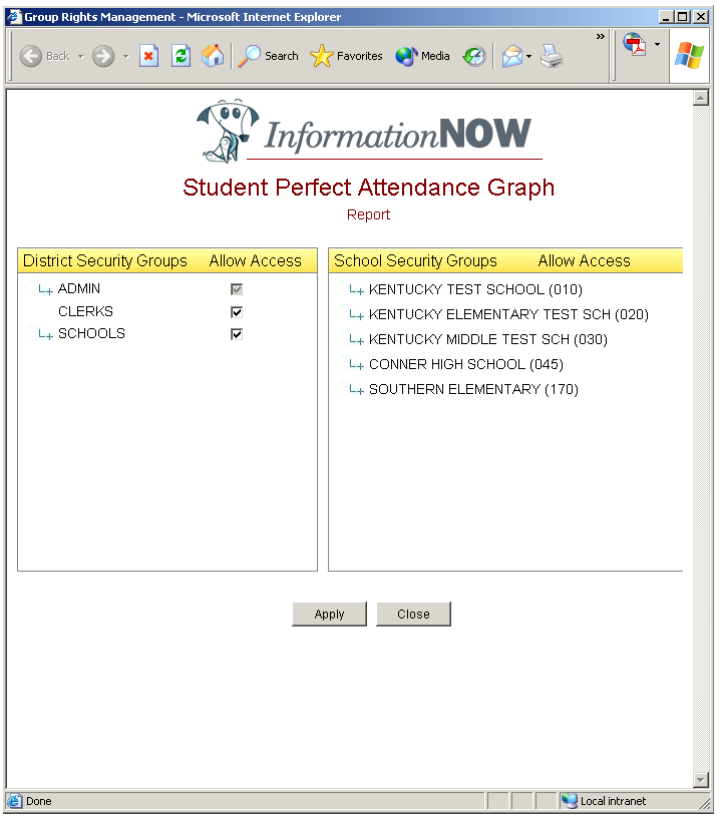


Report Administration Tab

This tab is only available for *Information*NOW Reporting Portal administrators. Select this tab to load custom reports and to manage rights to access reports. For custom reports, you may use *MS Reporting Services* or you may choose to link to custom URL's. You may also enable or disable the viewing of custom reports as templates.



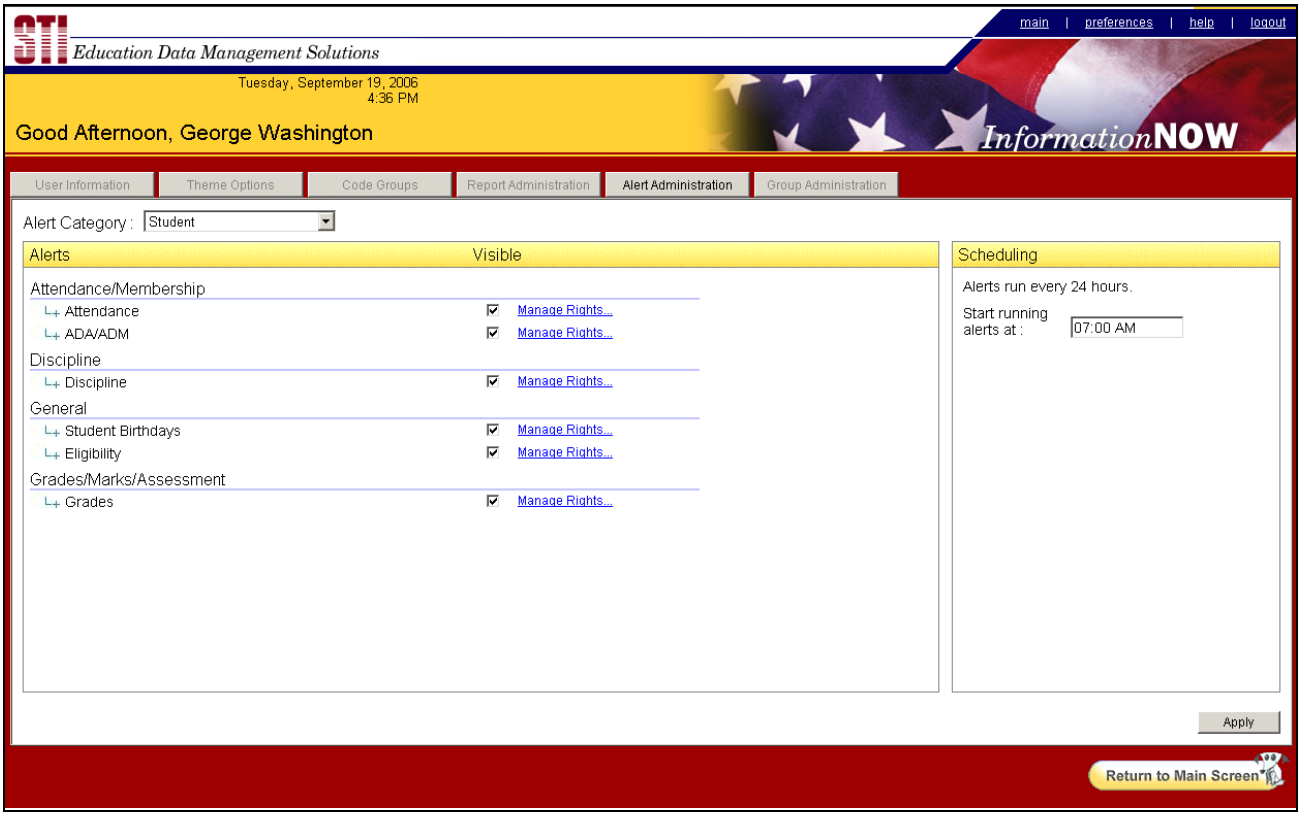
Clicking on **Manage Rights** on the right side of any available report will cause the *Group Rights Management* popup screen to appear.



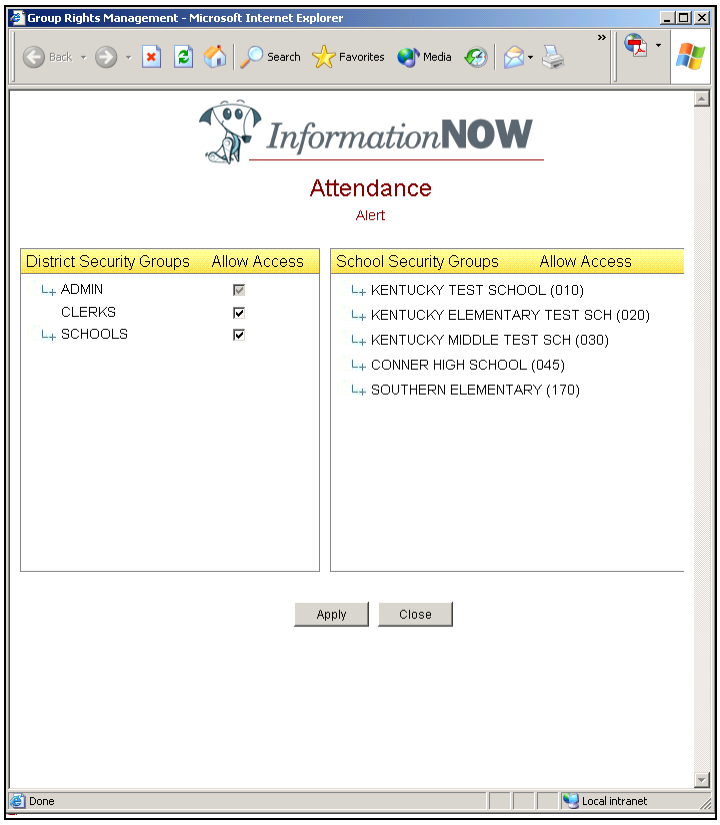
The Administrator may allow or deny access to a particular report by checking or unchecking the *Allow Access* box next to the appropriate security group. All users in the district or school security group will be allowed or denied access to this report based on this action.

Alert Administration Tab

This tab is only available for *Information*NOW Reporting Portal administrators. Select this tab to enable or disable the viewing of alert templates and to manage rights to specific alerts. You may also set up a schedule for running the templates on a system-wide basis.



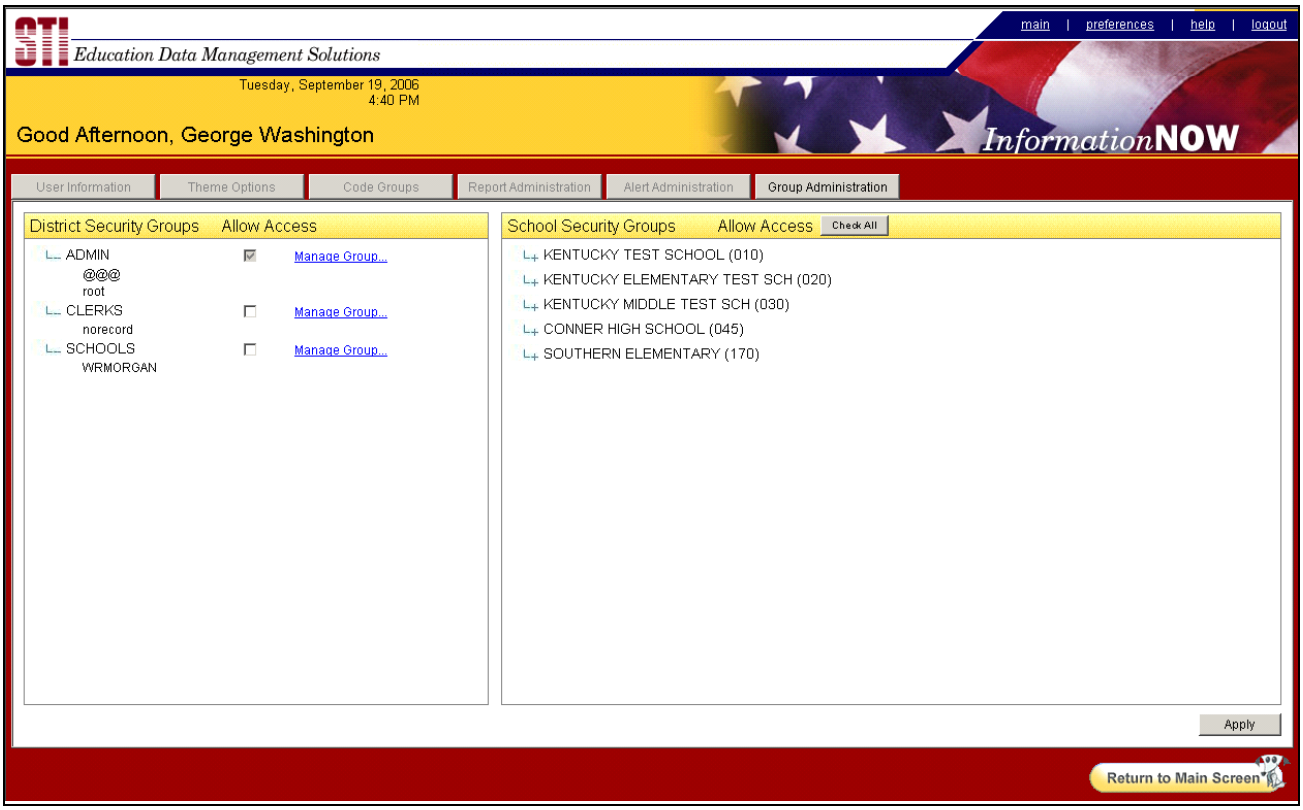
Clicking on **Manage Rights** to the right of any alert will cause the *Group Rights Management* popup screen to appear.



The Administrator may allow or deny access to a particular alert by checking the *Allow Access* box next to the appropriate security group. All users in the district or school security group will be allowed or denied access to this alert based on this action.

Group Administration Tab

This tab is only available for *Information*NOW Reporting Portal administrators. Select this tab to restrict or allow access to *Information*NOW Reporting Portal by other security groups. The *Admin District* security group always has access to *Information*NOW.

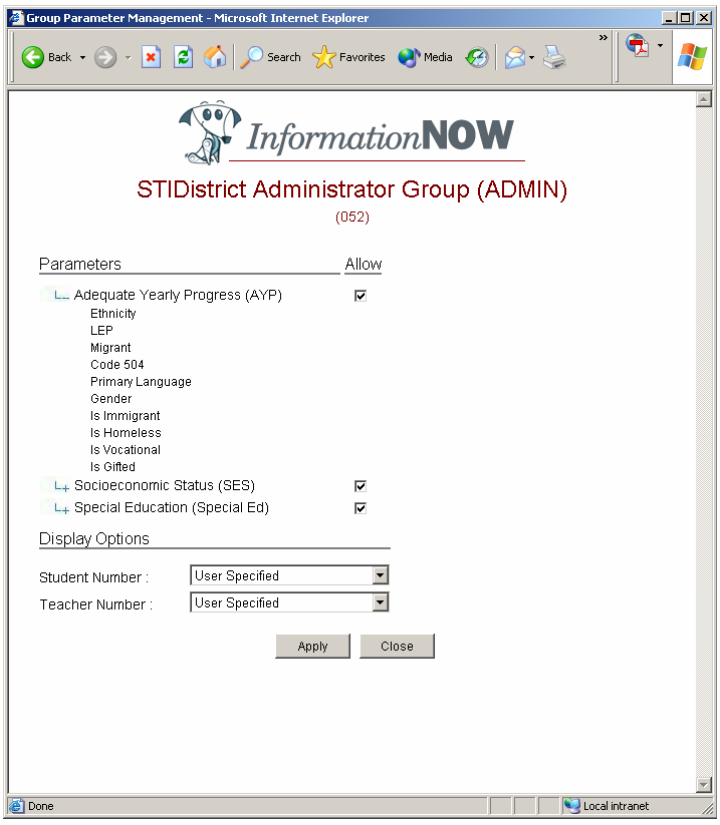


Click the **+** sign in the *District* security groups to view a drop-down list of users in that security group. Checking the check box next to a group will allow all member of that group to have access to *Information*NOW.

Click the **+** sign in the *School* security groups to view a drop-down list of teacher groups for that school. School security groups are established by the teacher types in the *TEA* table. Checking the box next to a group will allow all member of that group to have access to *Information*NOW. The **Check All** button to the right of the *Allow Access* field will select all school security groups for access privileges.

Click the **Apply** button to save changes.

Clicking on the **Manage Group** link beside any group in either *District* security groups or *School* security groups will cause the *Manage Groups* popup screen to be displayed. *Manage Groups* allows the administrator to define parameters and set display options for users in the selected security group.



Parameters are set in pre-defined *parameter groups*. Click the **+** sign next to a parameter group to see a drop-down list of parameters belonging to that group. Checking the check box next to a group will allow that group access to that particular parameter.

If *Allow* is not checked, the users in that group will see an *Access Restricted* message next to each parameter on any report or alert that is run using those parameters. That parameter will be unavailable to those users for filtering records.

Display Options set the field(s) a user is allowed to see on a report or alert. The Administrator selects one of the following options from the drop-down list:

- **None**: Prevents that item from displaying in reports or alerts for users in that security group.
- **User Specified**: Allows users to pick any available options when they run an alert or report.
- **Other options**: Allows only the chosen field to be displayed on the report or alert for that security group.

Click the **Apply** button to save changes.

Managing Reports

Manage Reports Screen

From the main screen of *Information*NOW Reporting Portal, click the **Manage Reports** link. The screen shown below will open.

On the left side you will see the list of *Available Reports* templates. These are standard report templates that have been pre-loaded into *Information*NOW Reporting Portal. The templates are grouped for student reports or for teacher reports. Select each group from the drop-down list. On the right side of the screen are the *Loaded Reports* instances. After you load one of the Available Reports templates, you will then rename the report with an instance name. For example, the Student Attendance Listing report could be given the new instance name of *Overall Attendance*.

Selecting and Creating Report Instances

Follow the steps below to select and create Report Instances.

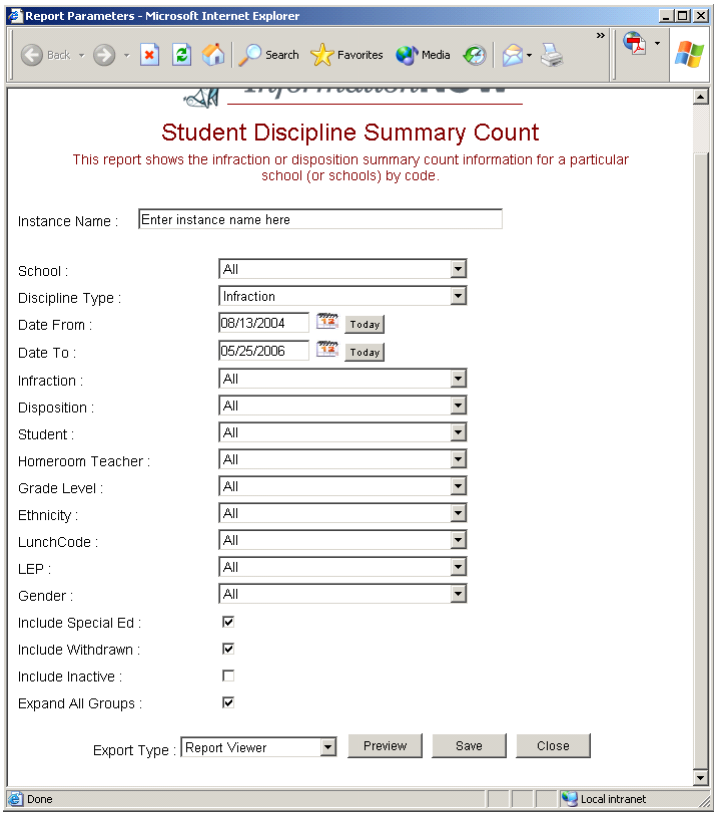
Step 1

In the *Available Reports* list, select the report you wish to configure.

Step 2

The report window opens. Enter the new *Instance Name* for your new report. The Instance Name has a maximum length of 50 characters. Each report will have a standard set of parameters that you may customize for your report instance. Each report will also have a set of specific parameters that you may select for your new report instance. These parameters are listed below the Instance Name.

Note: Not all parameters shown below are included for every report.



Step 3

Select the *Export Type* from the drop-down list and click the **Preview** button. From the drop-down list, you may select a variety of formats including:

- Report Viewer
- HTML 3.2 (1996 standard)
- PDF (Adobe Acrobat's Portable Document Format)
- HTML OWC (Microsoft Office Web Components)
- CSV (Comma Separated Value file format)
- HTML 4.0 (1999 standard)
- MHTML (MIME encapsulation of aggregate HTML documents)
- Image
- XML (Extensible Markup Language)

Step 4

After you are satisfied with your report parameters, click the **Save** button and then click **Close**. When you refresh the *Manage Report* screen (by pressing the *F5* key), you should see your new report instance on the loaded reports list.

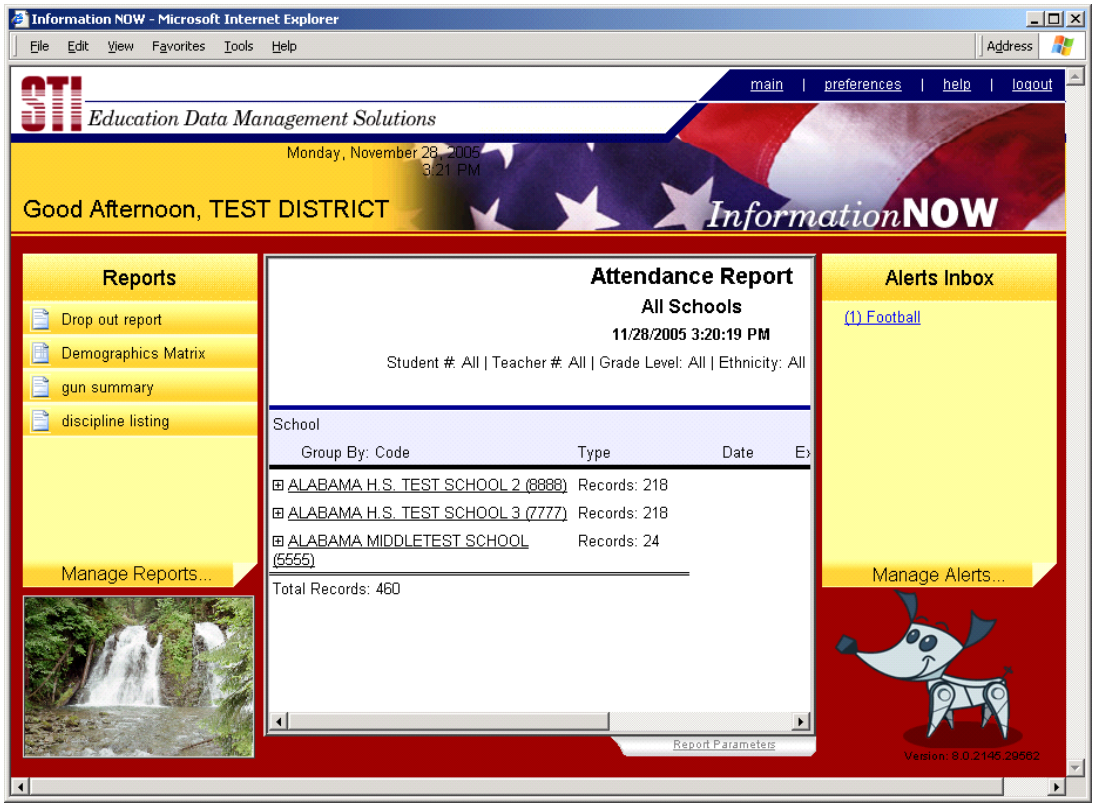
Selecting the Sort Order of the Report Instances

To select the *Sort Order* of the reports that are listed on the home page of *Information*NOW Reporting Portal, simply assign the priority of your loaded reports to 1, 2, 3, etc. When you navigate back to the home page, your reports will be listed in the sort order you selected. The report assigned with the *autoload* value will display in the center section of the home page. You may select up to 15 reports for sorting.

Managing Alerts

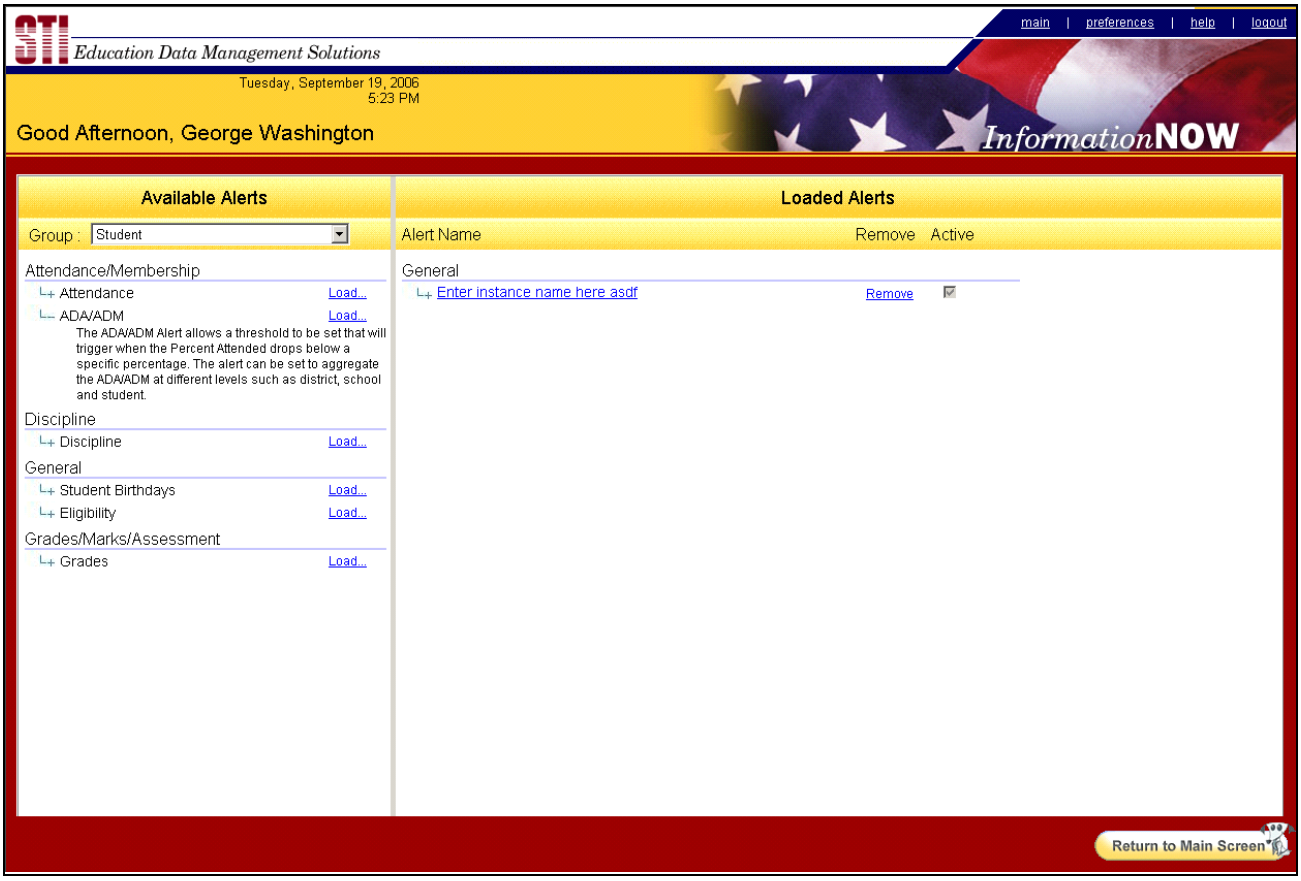
Alerts Inbox

The *Alerts Inbox* is displayed on the right side of the home page. To set up and manage the alerts that appear, click the **Manage Alerts** link.



Manage Alerts Screen

From the main screen of *Information*NOW Reporting Portal, click the **Manage Alerts** link. The screen shown below will open.



On the left side, you will see the list of *Available Alerts* templates, grouped by *Student* or by *Teacher* (whichever is selected in the *Group* drop-down list). On the right side of the screen are the alert instances that have been loaded from the alert templates. Here you may either *Remove* the alerts or enable/disable the alerts (by checking or un-checking the *Active* box).

Selecting and Creating Alert Instances

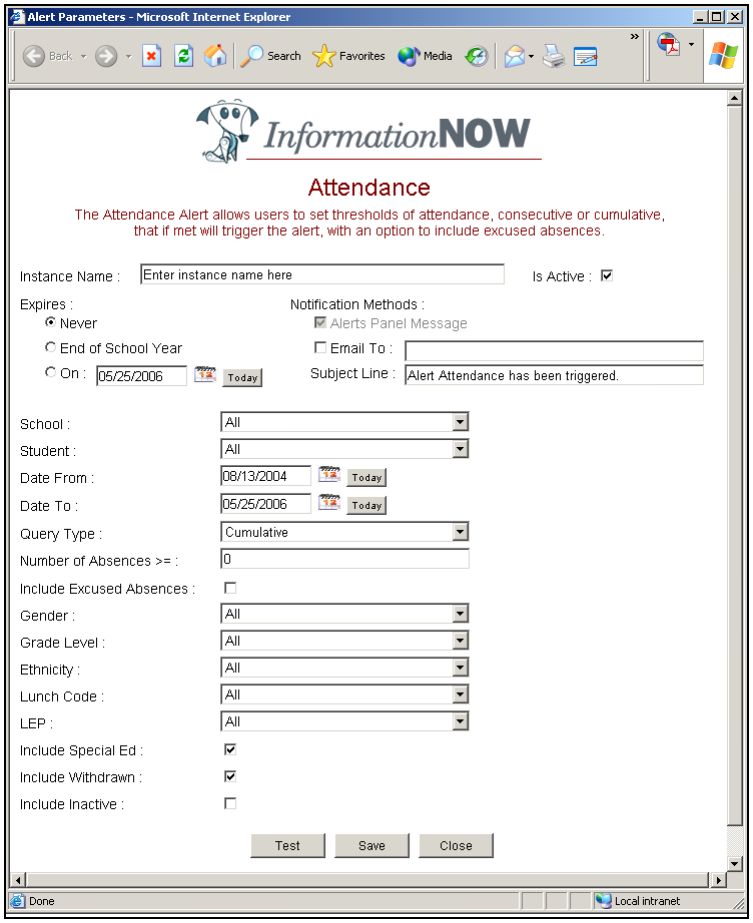
Step 1

In the *Available Alerts* list, select the alert to configure.

Step 2

The alert window will open. From this screen, you may create a new instance of the alert by entering a new *Instance Name*. The Instance Name has a maximum length of 50 characters. You may set up the alert parameters by using the drop-down lists, option buttons and checkboxes available below. When the parameters have been set, test and run the alert.

Note: Not all parameters shown below are included for every Alert.



Step 3

Click the **Save** button and then click **Close**. When you refresh the *Manage Alerts* screen (by pressing the *F5* key), you should see your new alert instance on the *Loaded Alerts* list.

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