PowerSchool

© PowerSchool Group LLC

BUSINESSPLUS LEVEL II

Gayla Jenner

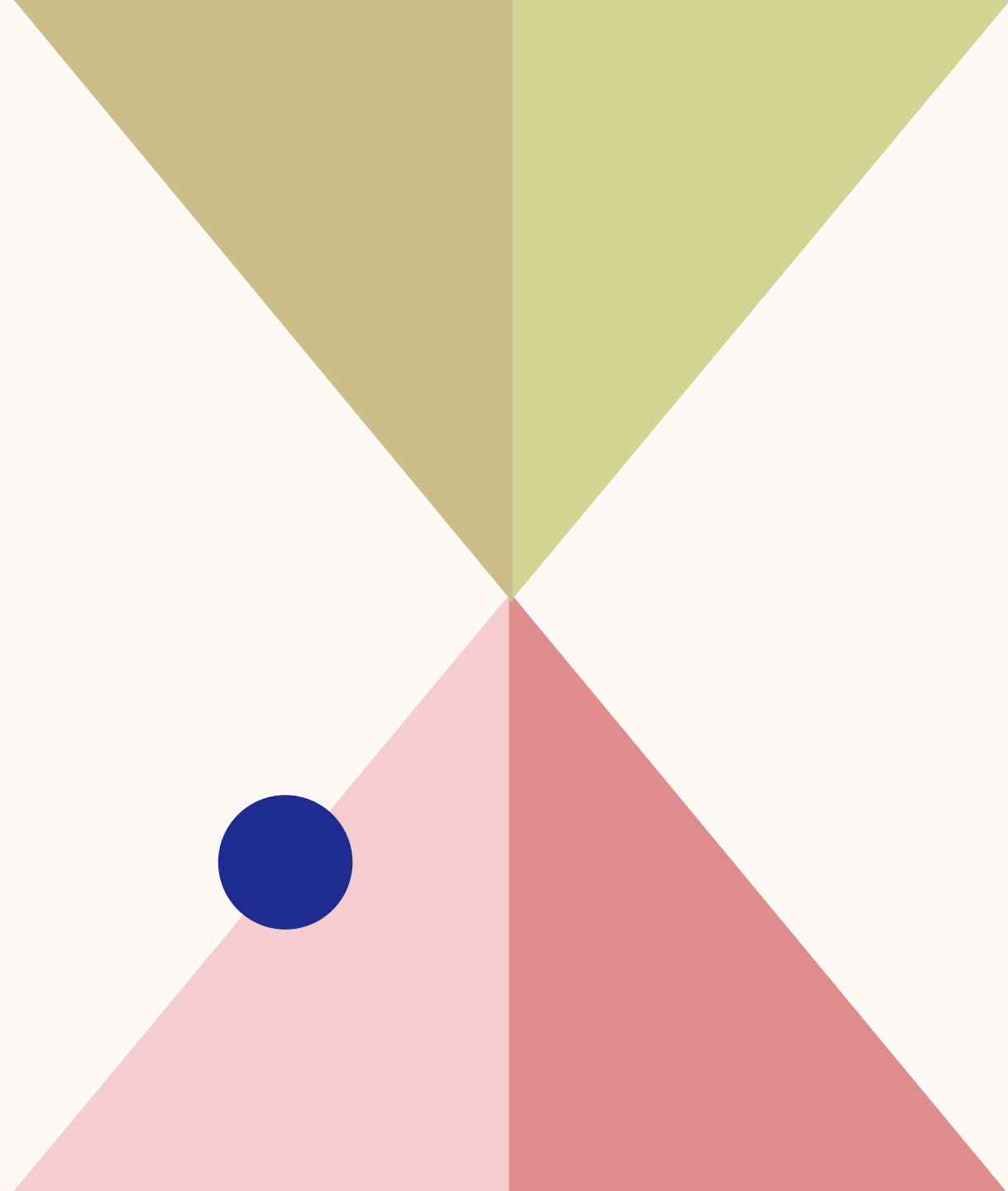
AGENDA

Introduction

Dashboards

Running Reports

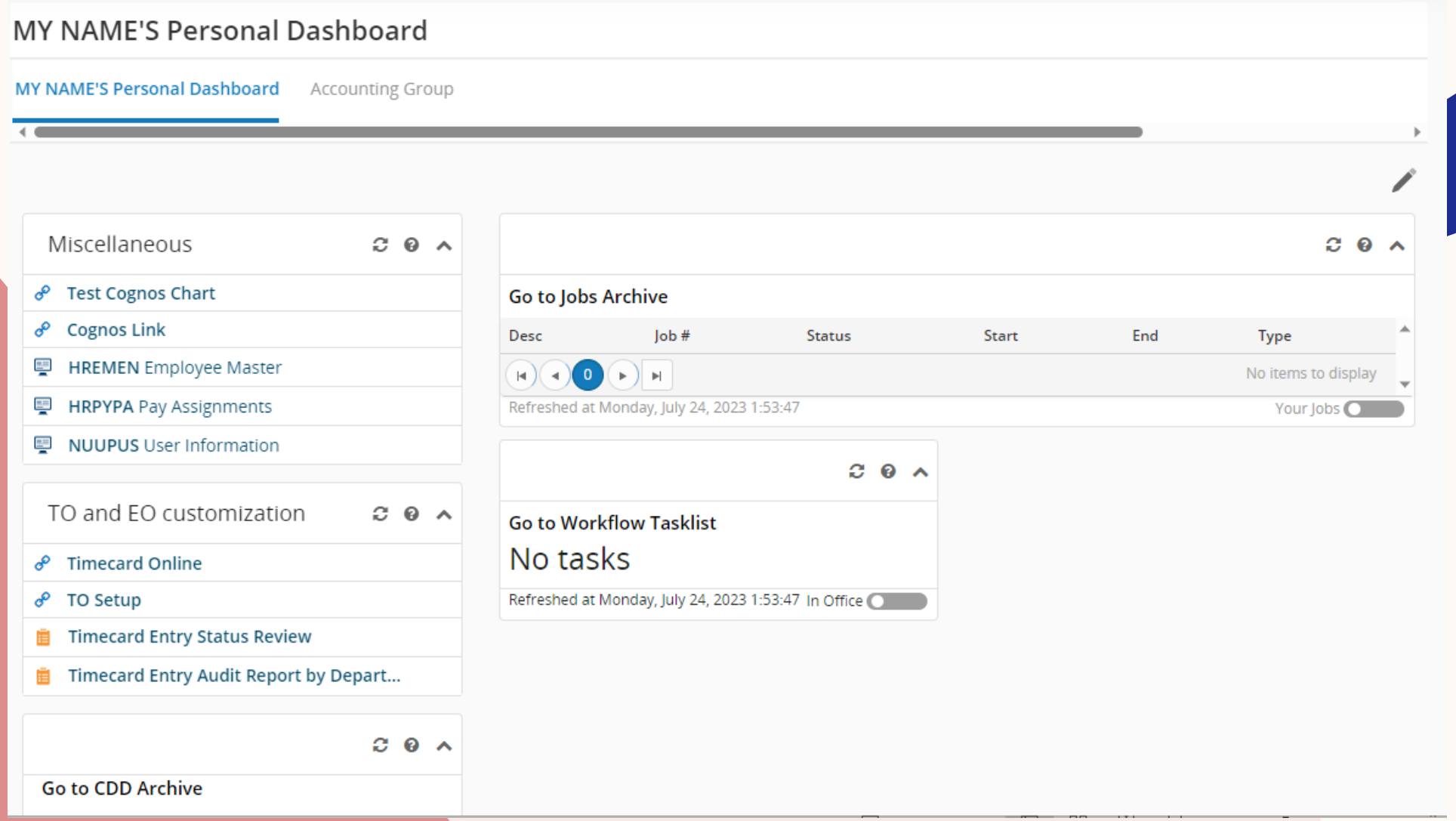
Question Time



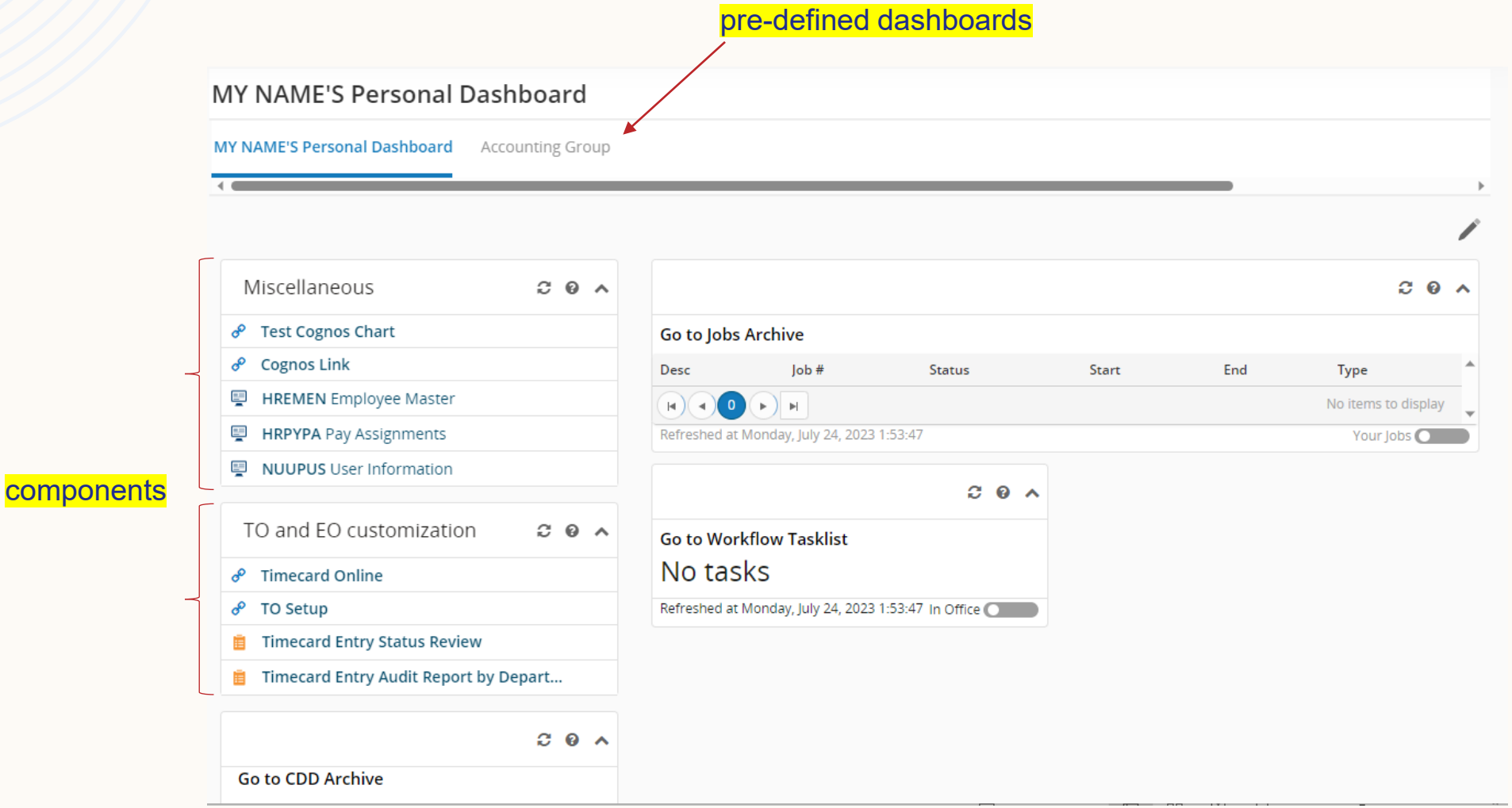
INTRODUCTION

Congratulations on being a “Level I” user! On to “Level II” where we will explore ways to customize your BusinessPlus experience as well as reporting tips that may save you some additional steps and/or time.

CUSTOMIZING YOUR DASHBOARD



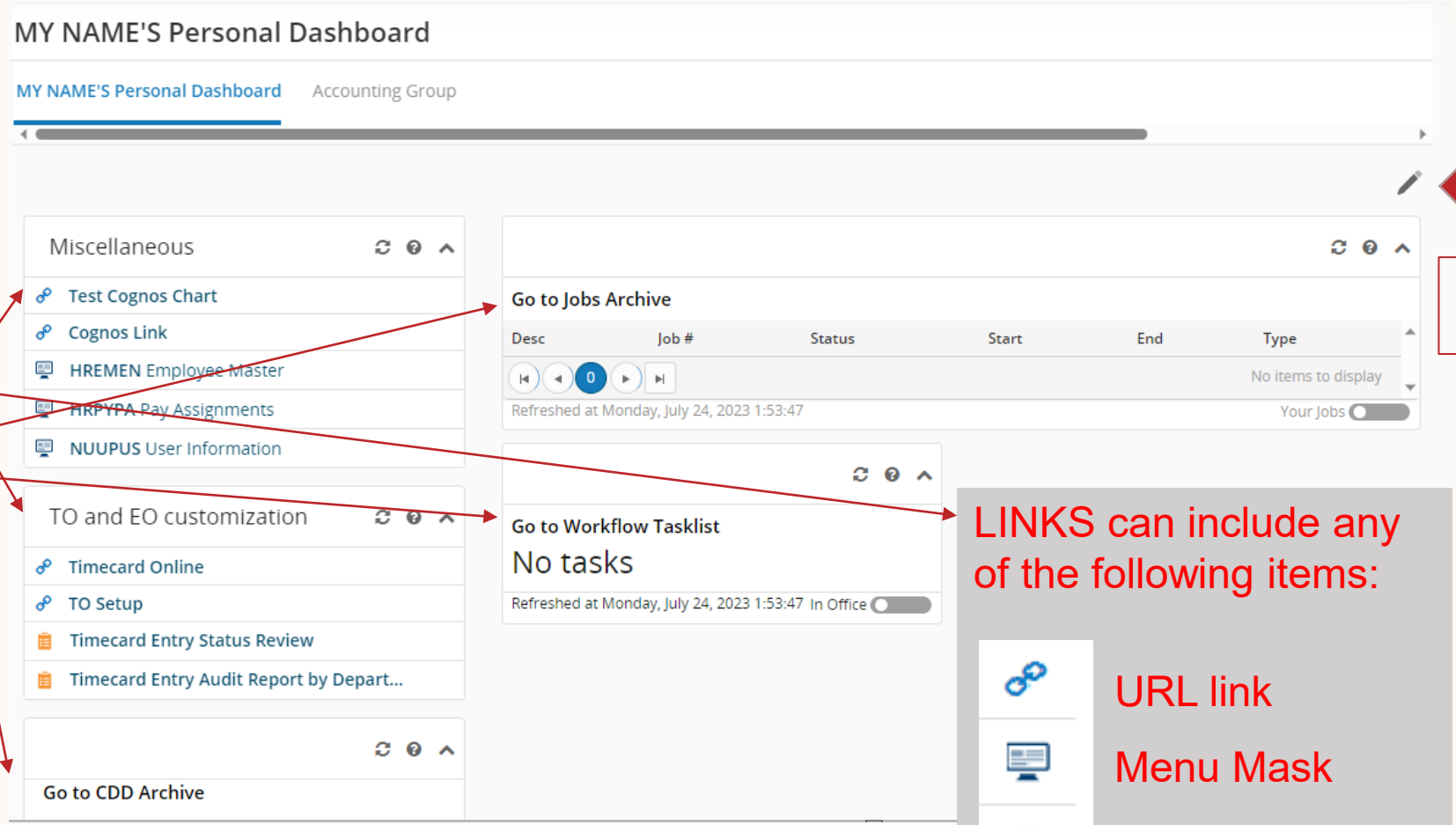
CUSTOMIZING YOUR DASHBOARD



CUSTOMIZING YOUR DASHBOARD

Components:

Links
Job Monitor
Tasklist
CDD Folder
Active Users*



Add Component
Change Layout
Restore Default
Undo Changes
SAVE!

LINKS can include any of the following items:

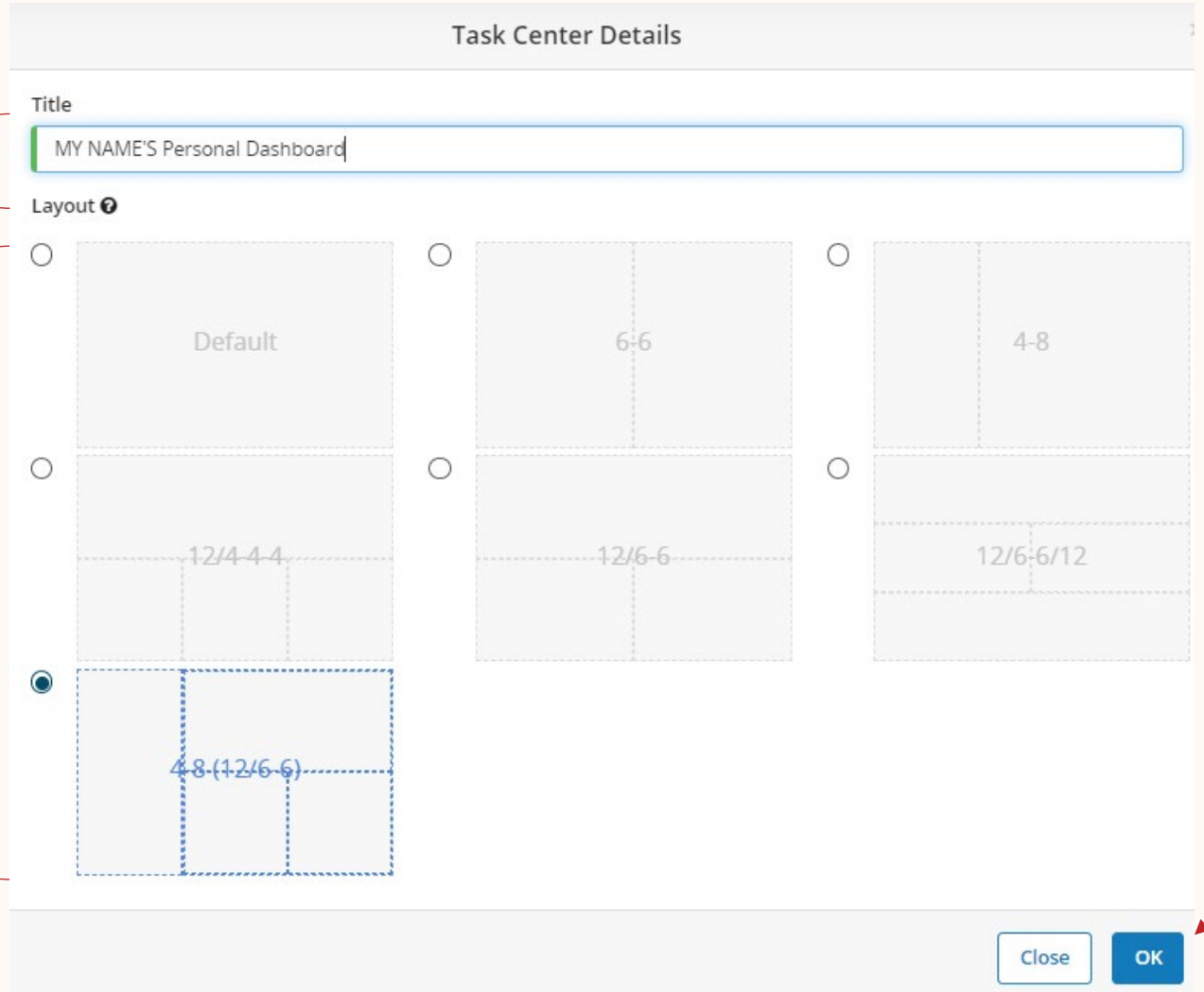
URL link
Menu Mask
CDD Report

CUSTOMIZING YOUR DASHBOARD

STEP 1: Choose Your Layout

Change Title if desired

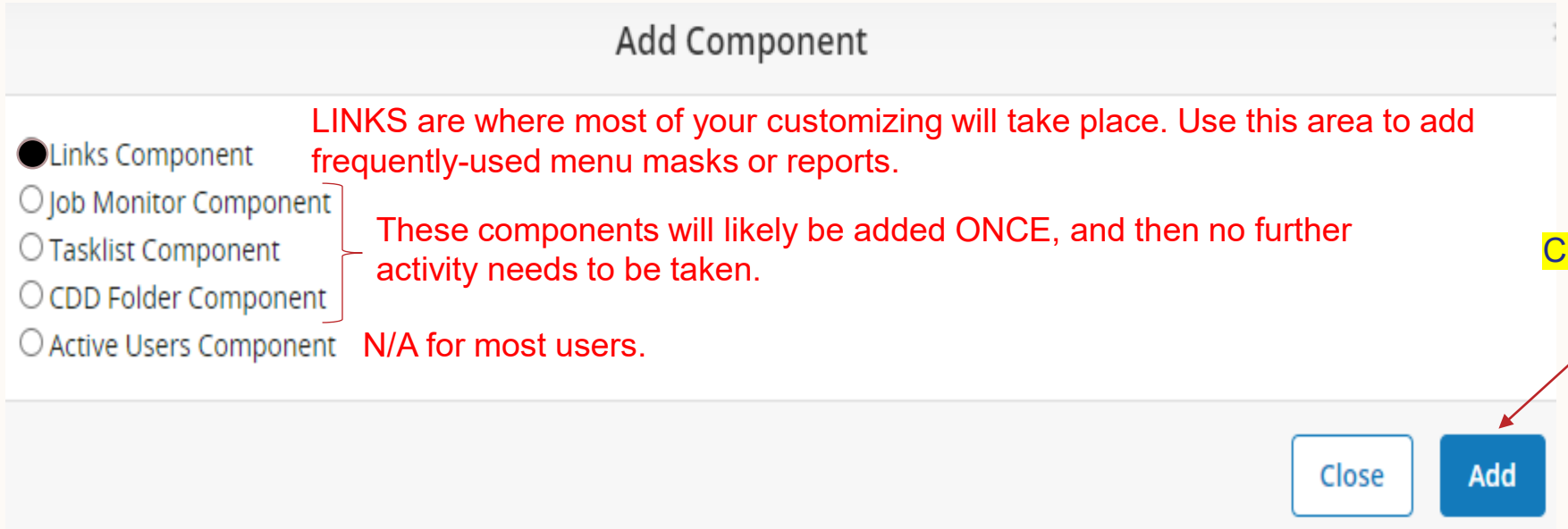
Choose Layout if desired



Click OK to complete

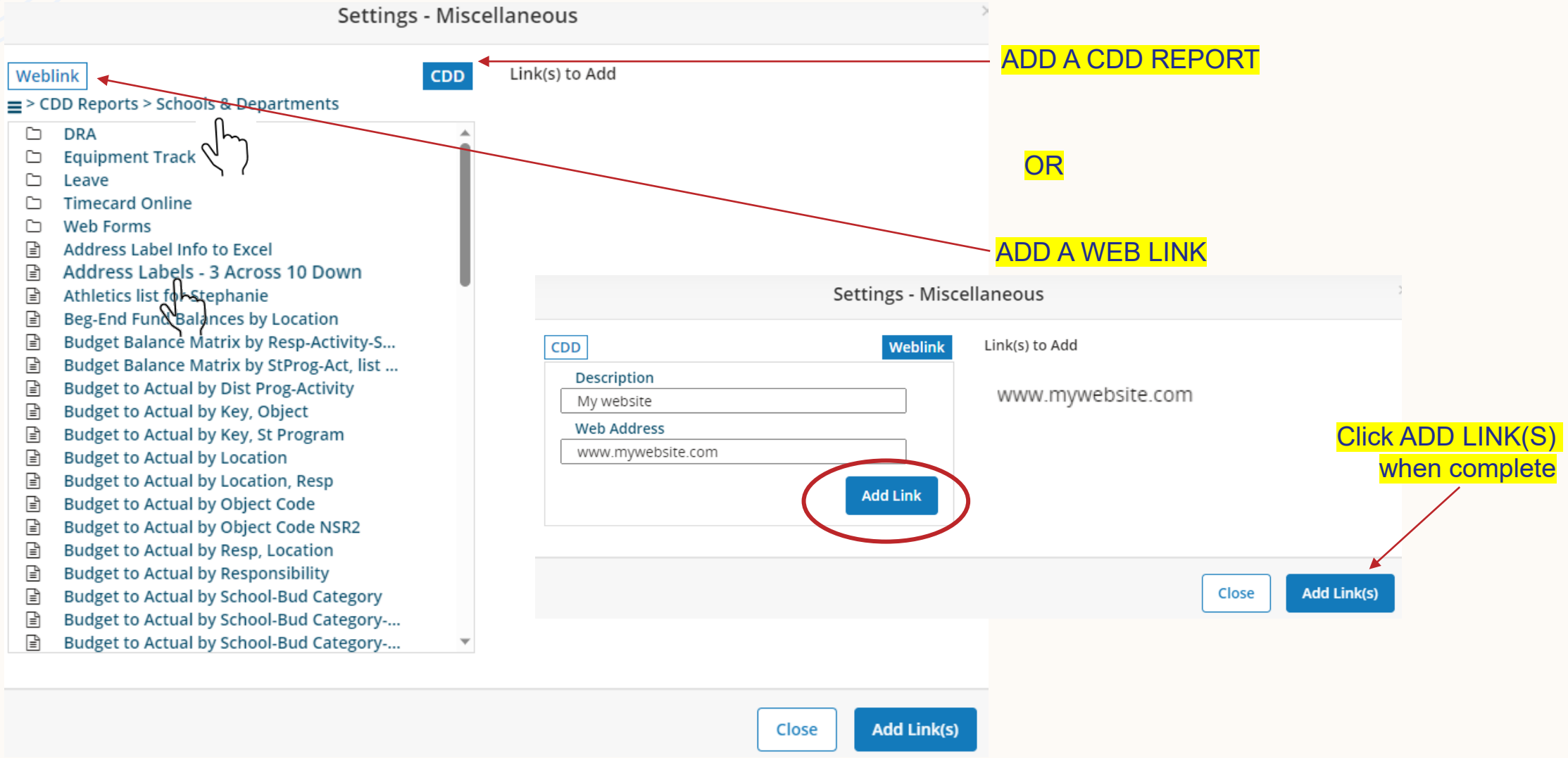
CUSTOMIZING YOUR DASHBOARD

STEP 2: Choose Your Component



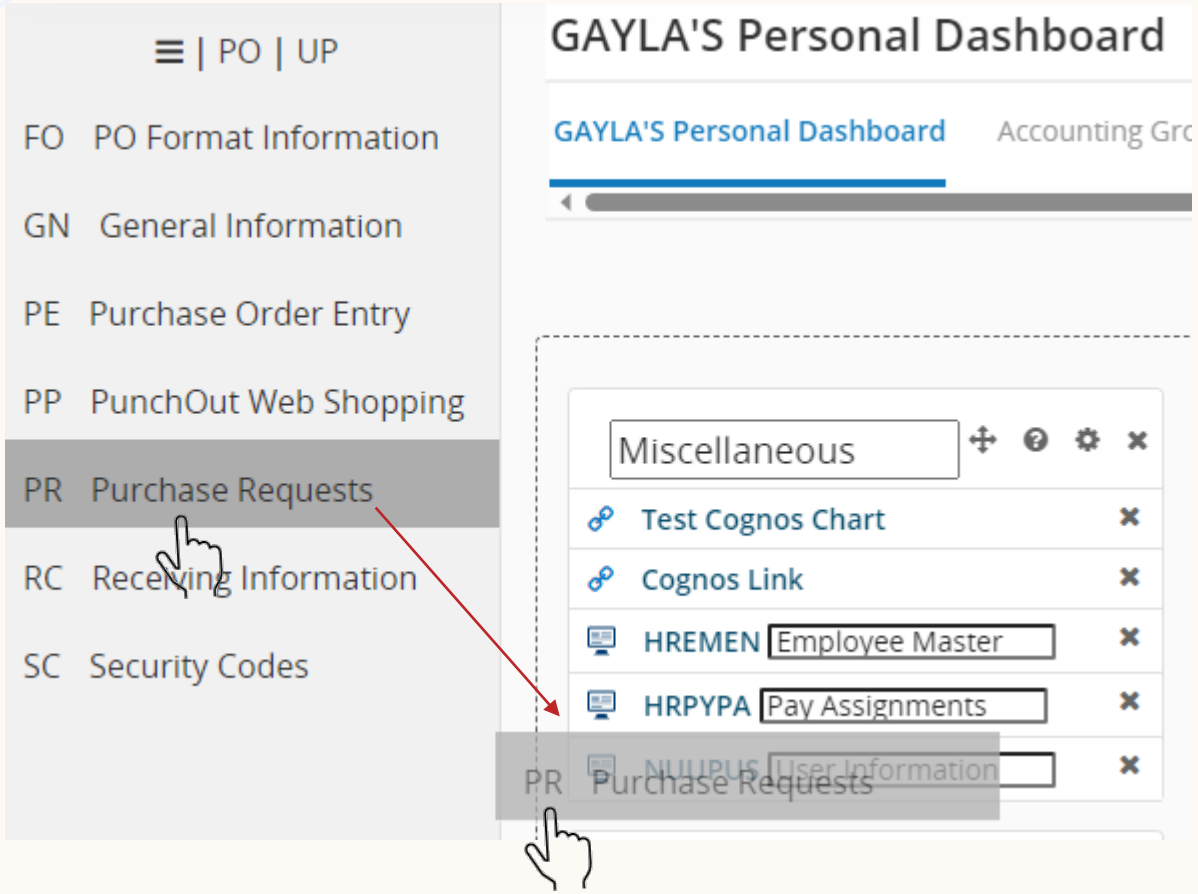
CUSTOMIZING YOUR DASHBOARD

STEP 2a: For LINKS component only

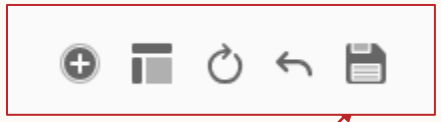


CUSTOMIZING YOUR DASHBOARD

STEP 2b: For LINKS Component only



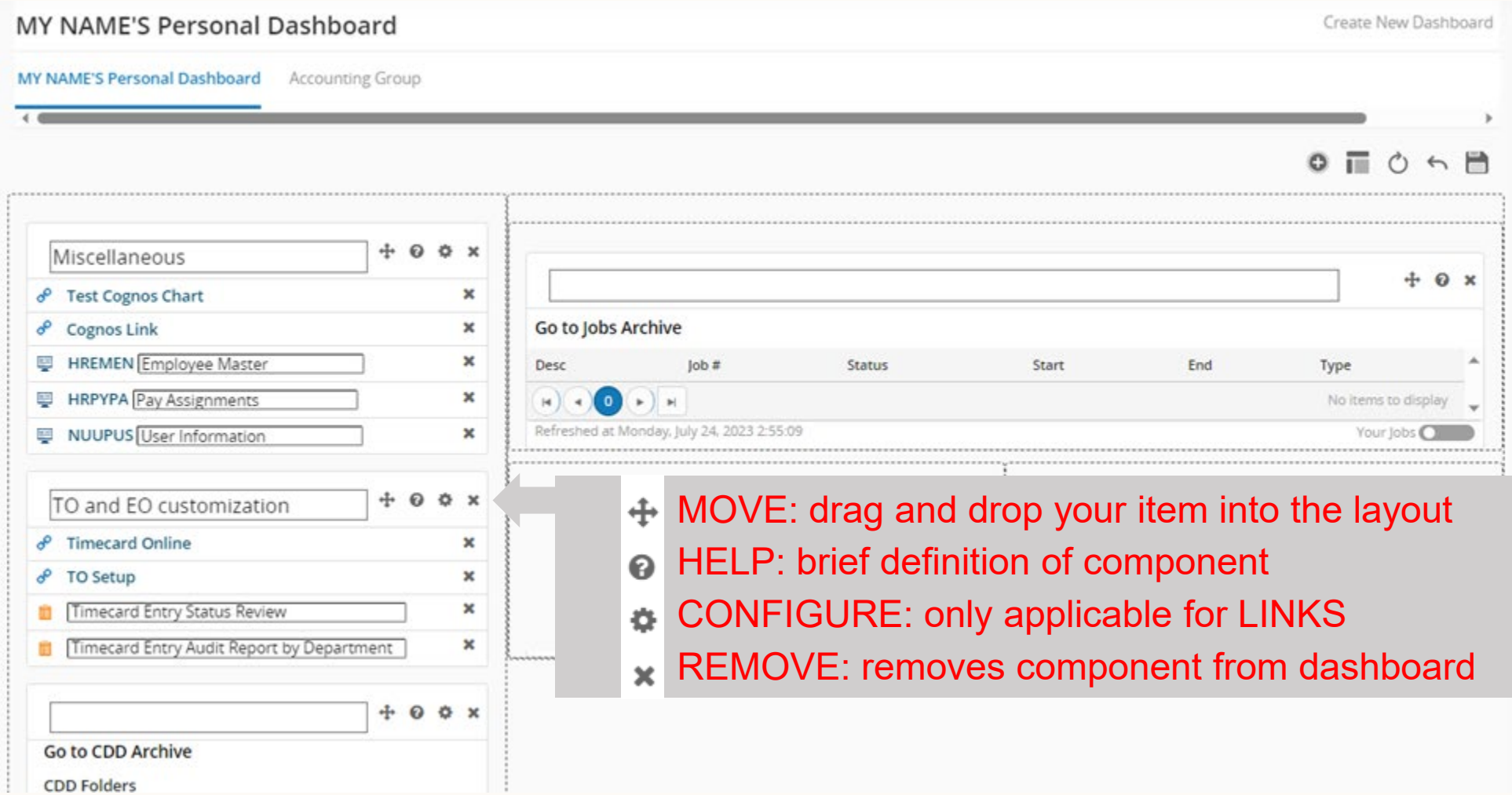
To add a menu mask: navigate in the main menu, then drag and drop into your Component.



Remember to SAVE after your changes are complete!

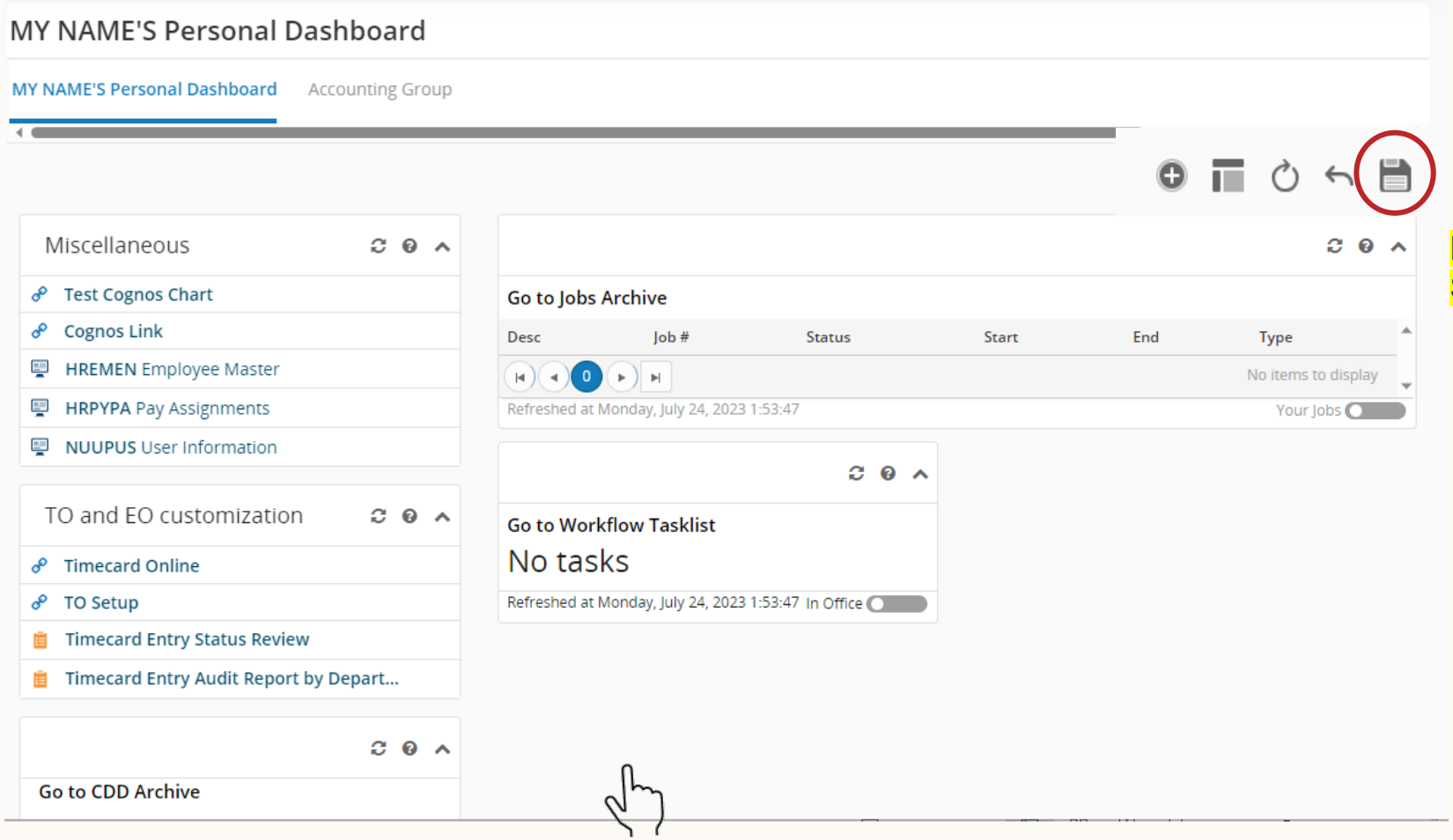
CUSTOMIZING YOUR DASHBOARD

STEP 3: Arrange Your Components



CUSTOMIZING YOUR DASHBOARD

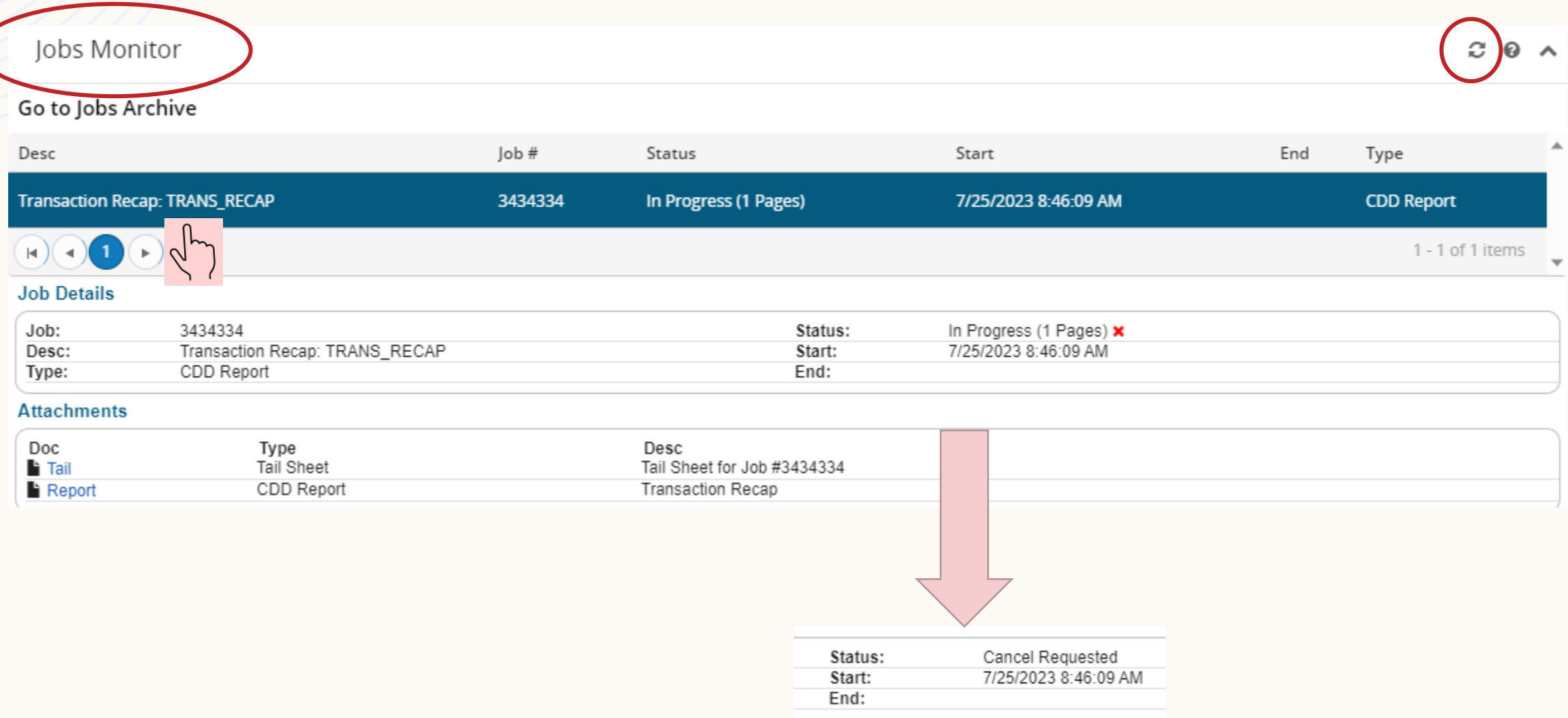
STEP 4: SAVE your dashboard



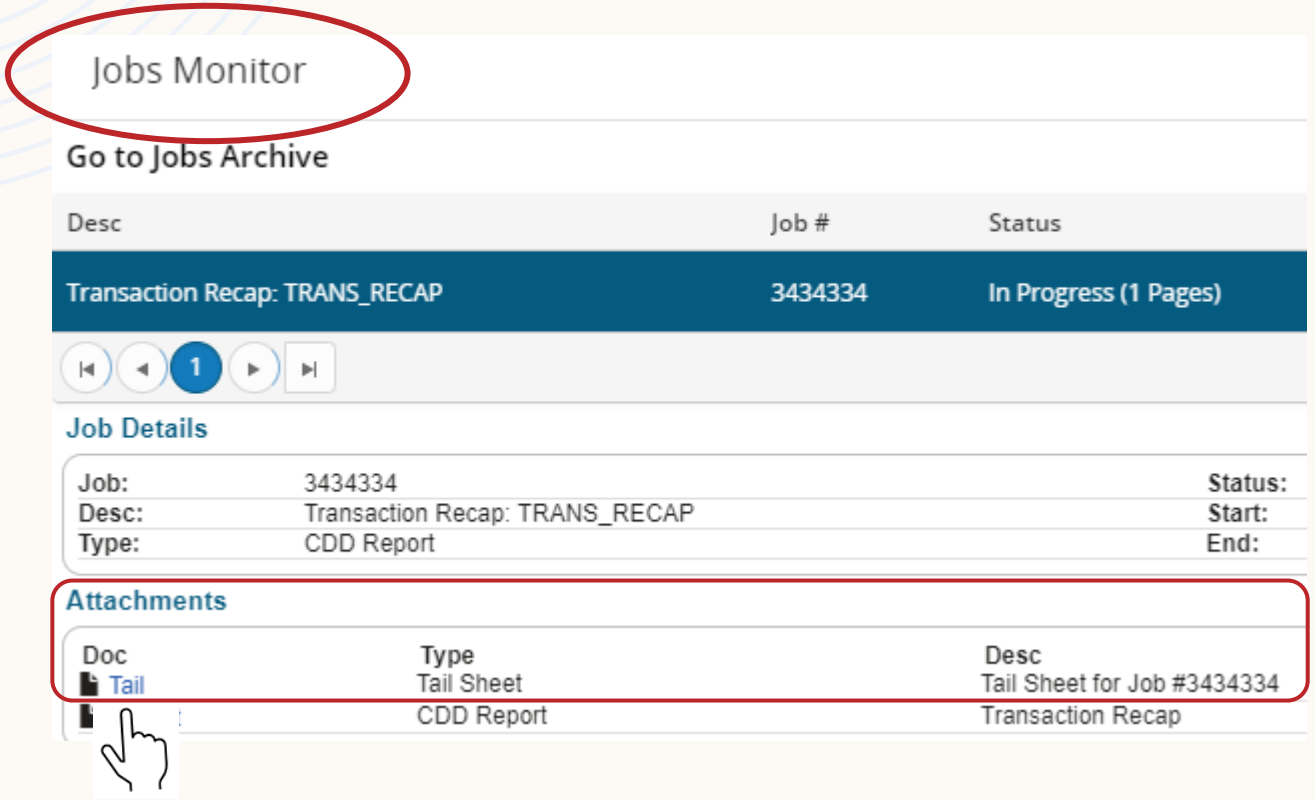
Remember to SAVE!

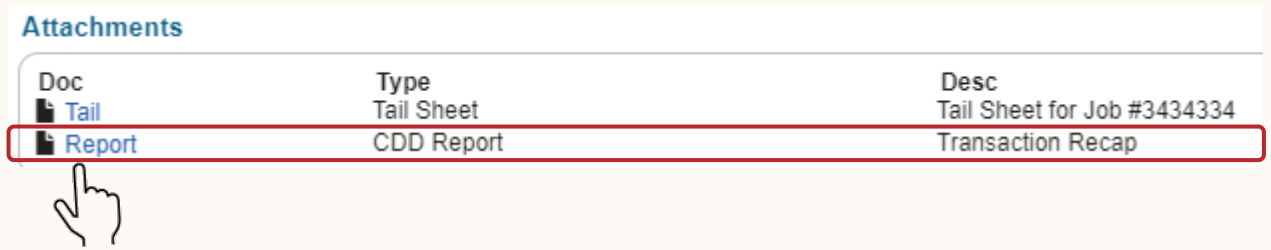
RUNNING REPORTS

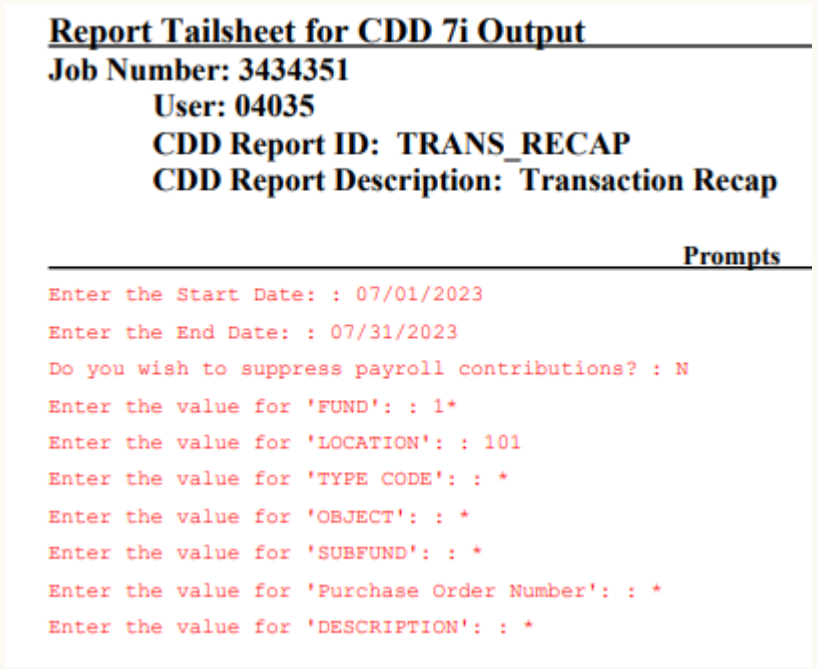
RUNNING REPORTS



RUNNING REPORTS





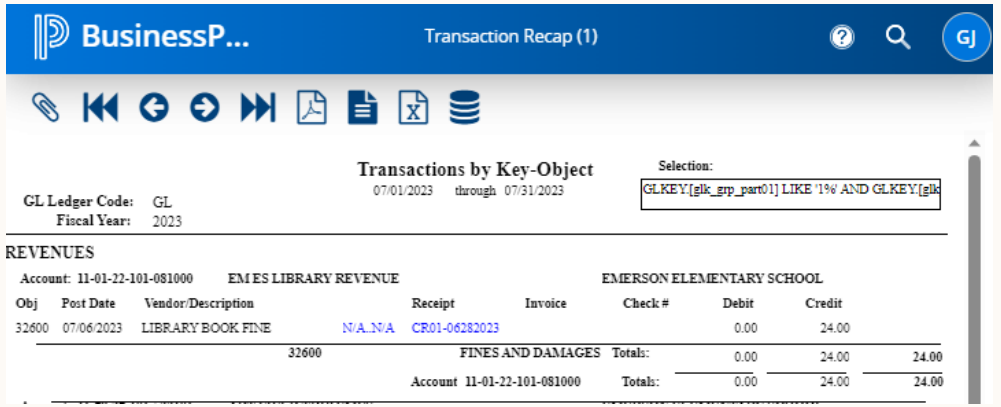


Report Tailsheet for CDD 7i Output

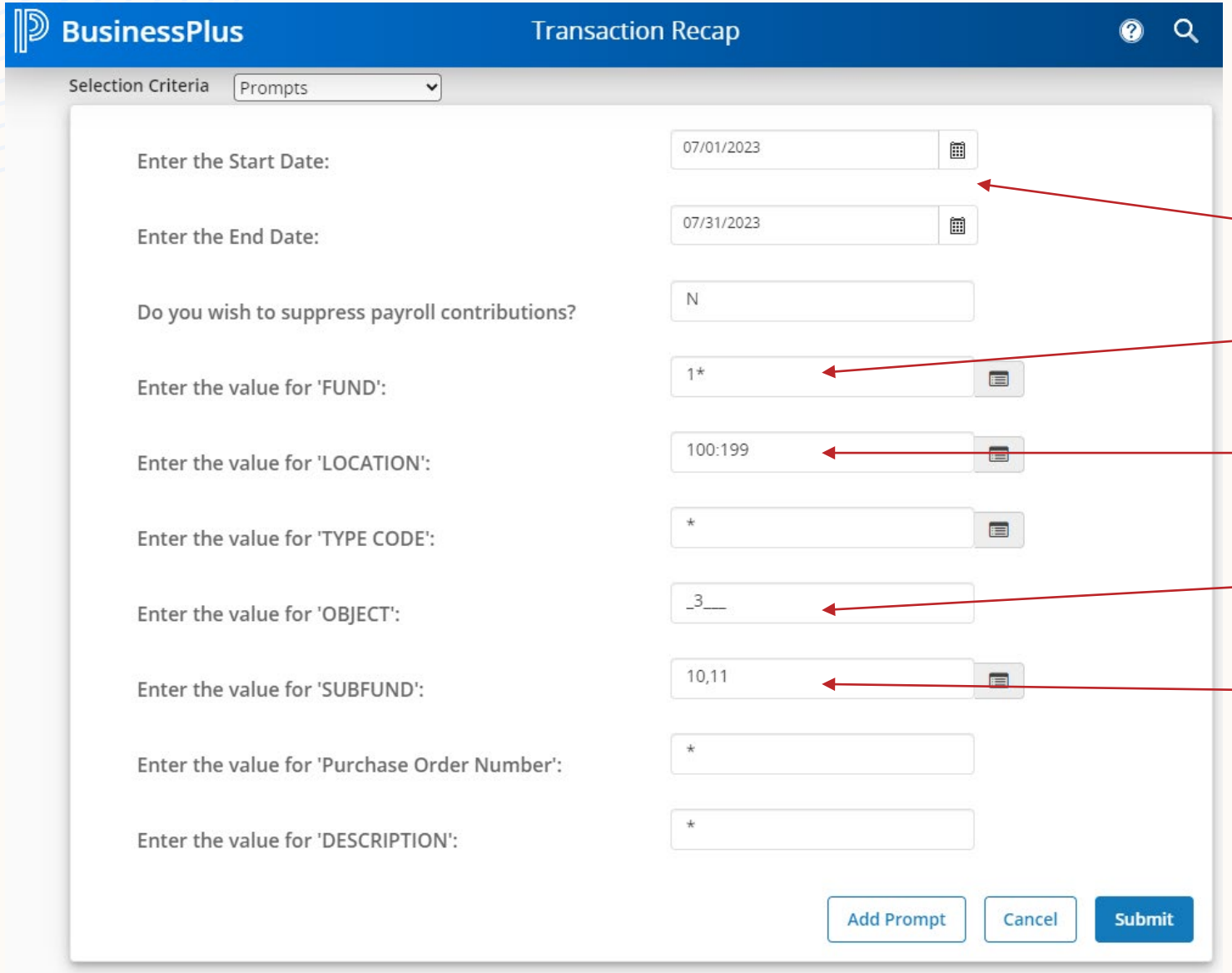
Job Number: 3434351
User: 04035
CDD Report ID: TRANS_RECAP
CDD Report Description: Transaction Recap

Prompts

```
Enter the Start Date: : 07/01/2023
Enter the End Date: : 07/31/2023
Do you wish to suppress payroll contributions? : N
Enter the value for 'FUND': : 1*
Enter the value for 'LOCATION': : 101
Enter the value for 'TYPE CODE': : *
Enter the value for 'OBJECT': : *
Enter the value for 'SUBFUND': : *
Enter the value for 'Purchase Order Number': : *
Enter the value for 'DESCRIPTION': : *
```



RUNNING REPORTS



Dates vs. Date Ranges

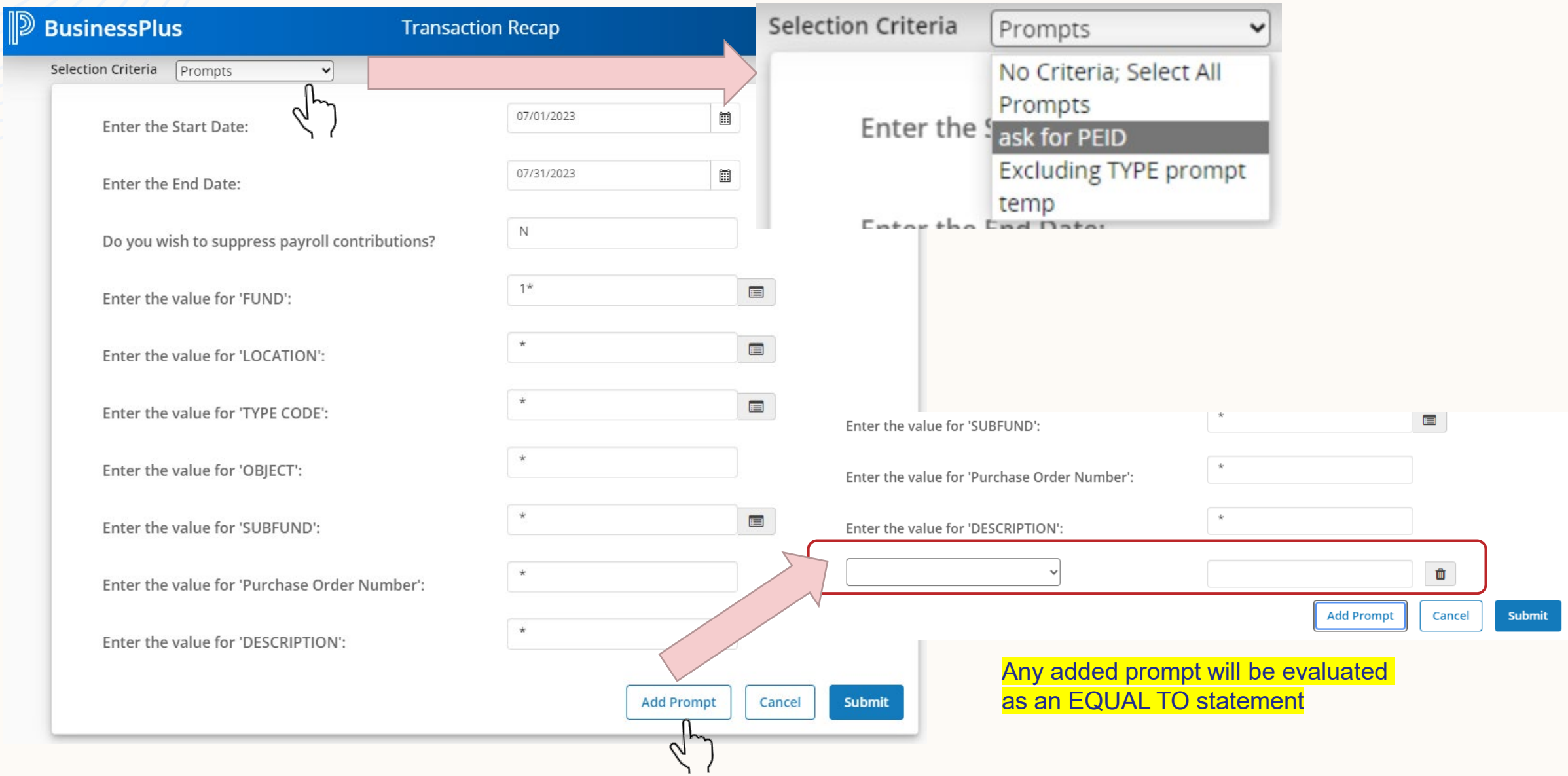
Asterisk (‘*’) = Wildcard (or ‘%’)

Range of Values with Colon

Character Replacement with Underscore

Multiple Value Search with Comma

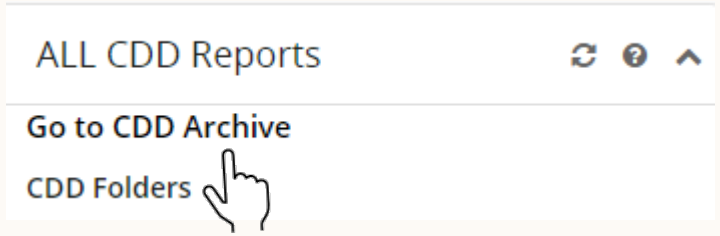
RUNNING REPORTS

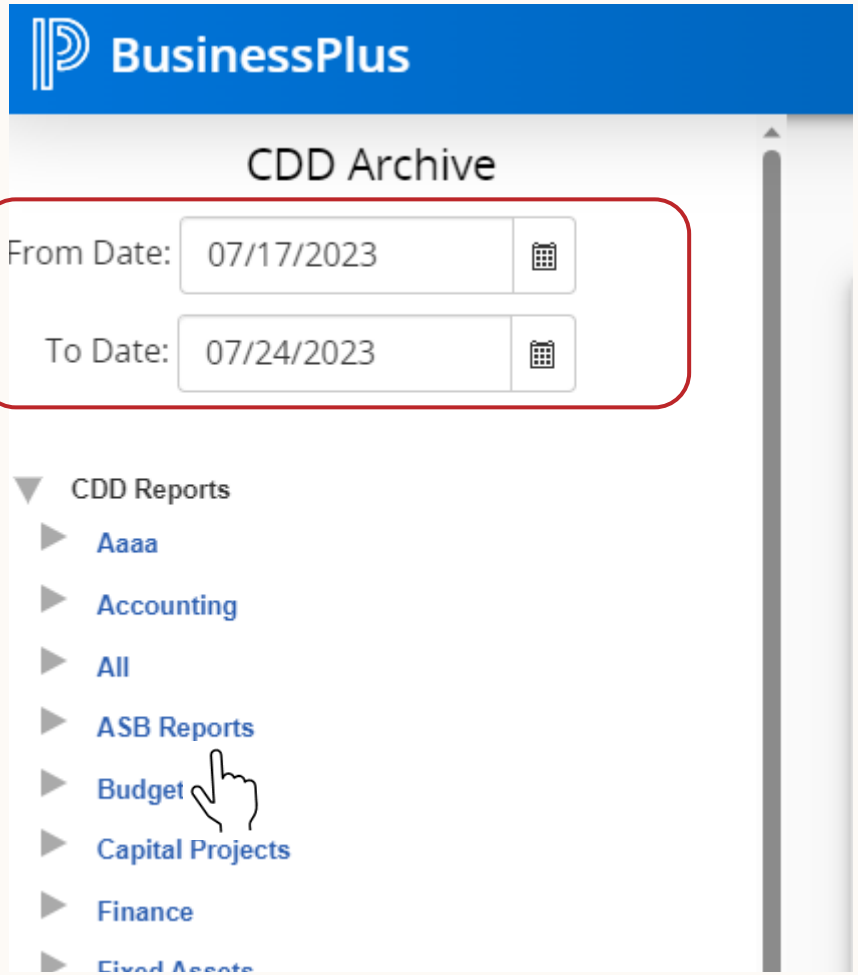


Any added prompt will be evaluated as an EQUAL TO statement

RUNNING REPORTS

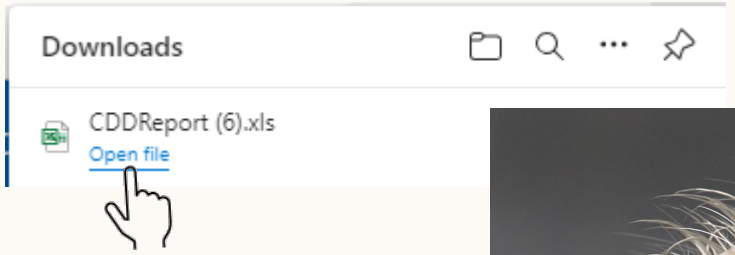
Archive

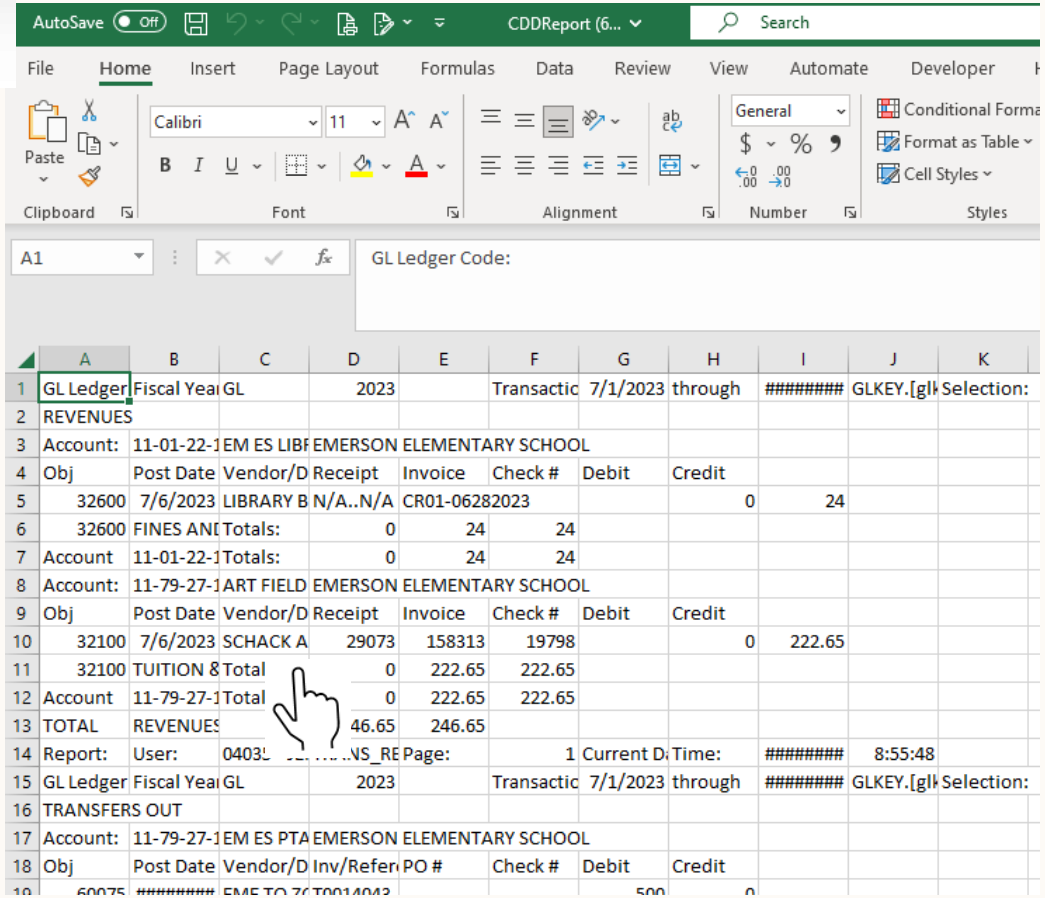




RUNNING REPORTS

Excel





	A	B	C	D	E	F	G	H	I	J	K
1	GL Ledger	Fiscal Yea	GL	2023		Transactic	7/1/2023	through	########	GLKEY.[gl	Selection:
2	REVENUES										
3	Account:	11-01-22-1	EM ES LIBF	EMERSON ELEMENTARY SCHOOL							
4	Obj	Post Date	Vendor/D	Receipt	Invoice	Check #	Debit	Credit			
5	32600	7/6/2023	LIBRARY B	N/A..N/A	CR01-06282023			0	24		
6	32600	FINES ANI	Totals:	0	24	24					
7	Account	11-01-22-1	Totals:	0	24	24					
8	Account:	11-79-27-1	ART FIELD	EMERSON ELEMENTARY SCHOOL							
9	Obj	Post Date	Vendor/D	Receipt	Invoice	Check #	Debit	Credit			
10	32100	7/6/2023	SCHACK A	29073	158313	19798		0	222.65		
11	32100	TUITION &	Total	0	222.65	222.65					
12	Account	11-79-27-1	Total	0	222.65	222.65					
13	TOTAL	REVENUES		46.65	246.65						
14	Report:	User:	0403	NS_RE	Page:	1	Current D	Time:	########	8:55:48	
15	GL Ledger	Fiscal Yea	GL	2023		Transactic	7/1/2023	through	########	GLKEY.[gl	Selection:
16	TRANSFERS OUT										
17	Account:	11-79-27-1	EM ES PTA	EMERSON ELEMENTARY SCHOOL							
18	Obj	Post Date	Vendor/D	Inv/Refer	PO #	Check #	Debit	Credit			
19	60075	########	EME TO 7(	T0014043			500	0			

Q&A

THANK YOU

Gayla Jenner
Director, Compensation and Benefits
gjenner@everettsd.org