Reporting

Running and Previewing Pre-Defined Reports

Importing Pre-Defined Reports

A large selection of pre-defined reports are available for import. Where appropriate, the option to import the associated templates or merge documents that define the design of these reports is available.

1. Select **Reports | Import** to display the **Import report(s)** dialog.

2. Click the **Open** button to display the **Select report file to import** dialog.

3. Navigate to \Program Files\SIMS\SIMS .net. Highlight the required file name, e.g. PreDefined_Reports_vxxxx.RptDef (*where xxxx is the version of SIMS*) then click the **Open** button to return to the **Import report(s)** dialog.

4. Specify the report(s) you wish to import by selecting the associated check box(es). If the associated templates are not required, deselect the **Import associated templates** check box.

5. Click the **Import** button. The **Status** of the report(s) changes from **Pending** to **Imported**.

6. Click the **Close** button.

If the **Run Reports** browser is displayed, it must be re-opened before the newly imported reports are available.

Storing Reports

All reports are stored in the Document Management Server (DMS). Imported reports are automatically stored in the appropriate **\Focus** folder, e.g. **Student**, **Staff**, **Class**, etc. but can be copied to other folders, provided you have appropriate Permissions. Imported pre-defined reports cannot be copied to your **\My Reports** folder, as you did not create them.

Selecting Reports

1. Select **Report | Run Report** to display the **Report** browser.

2. Navigate to then click the required folder.

   All the available reports are displayed in the right-hand panel. The availability of the reports depends on the permissions assigned to you and whether reports have been made Public.

3. Highlight the required report name then click the **Run** button.

4. If the **Enter parameter values for report** dialog is displayed, enter the required values then click the **OK** button (see overleaf for details).

> **TIP:** By highlighting a report name from the list displayed, the specified output type for the report will be displayed at the top of the **Report** browser. If the report has been created to enable a choice at runtime, select the type of output from the drop-down list.

> The facility exists to produce labels for Parental Addresses, Index Cards and Name Badges in addition to customising existing label templates.

> Applicable to Student Reports only.
> **TIP:** Highlight a record in the **Report Preview Results** panel then click the **Details** button. Alternatively, double-click the students record to display the **Student History** page, which provides additional details relating to that student.

My Reports Folder
Used to store all reports created by you.

My Favourites Folder
Used to store any publicly available reports that you wish to access often.

Focus Folder
Contains sub-folder for Student, Staff, Class, Aspect, etc.

Category Folder
The Category folder is located below the Focus folders and is initially empty, users with appropriate Permissions can create Report Categories, which appear as sub-folders within the Category folder.

> **TIP:** Drag the thick black line at the bottom of the **Report** browser downwards to change the spacing between the browser

> All reports stored in the selected folder are displayed in the right-hand panel.

> The right-click functionality enables you to display the records in groups based on the selected column heading.
> In the example below, selecting **Address Line** displays all pupil/students who live at each address separated by a horizontal line.

Previewing Reports

When in **Preview** mode, records can be excluded or included and the sort order of the report changed. Amendments are reflected in the final report output but are not saved with the original report design.

All available records can be viewed at any stage by clicking the **View** button then selecting **All**. The selected **View** and number of **Rows** included in the report are displayed at the top of the **Preview Report Results** panel.

Click any column heading to toggle the data between ascending and descending order.

The records that have been either added or removed from the report content are highlighted in grey. The symbols shown in the first column indicate the following:

- **&** record added to the original report selection
- **R** record removed from the original report selection
- **Z** record not included in the original report selection and not required
- **X** newly extracted records
- No Symbol indicates original report selection records.

To run the report, click the **Run** button located at the top right hand-side of the **Preview Report Results** panel.

Excluding Records

1. Click the **View** button then select **Selected** from the drop-down list.

2. Highlight the record(s) to be excluded from the report then click the **Exclude** button.

3. Click the **View** button then select **All**. The excluded records are highlighted in grey and preceded with an **R**.
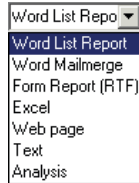
Including Previously Excluded Records

1. Click the **Extend** button. All available records within the **Focus** are displayed (this may take some time).

2. Click the **View** button then select **Excluded**.

3. Highlight the record(s) you wish to add to the report then click the **Include** button.

4. Click the **View** button then select **All**. The records added to the report are highlighted in grey and preceded with an **&**.

Running Reports

Users with suitable Permissions can access the pre-defined reports once they have been imported into the system. The report creator may have designed the report to run in a specific output such as Microsoft® Excel or the report may have been designed to allow a choice of output at run-time.

1. Select **Report** | **Run** to display the **Reports** browser then select the required report as described overleaf.

2. If **Allow choice of output at run-time** has been enabled by the report creator, select the type of output required from the drop-down list.

3. You may also be prompted to select parameter runtime values at run-time for the report (please see below).

```
Word List Repo ▼
Word List Report
Word Mailmerge
Form Report (RTF)
Excel
Web page
Text
Analysis
```

Selecting the Report Output Type and Settings

Running a Word List Report

Use this report output only if your List report will fit comfortably across a sheet of paper. The list is produced by merging the data from the report design with a Word document (the format of which is determined by a Microsoft® Word Template).

Word List Settings:

Standard Portrait or **Standard Landscape**.
Report Template - Uses an existing report template.

Dietary Needs
Student
Mark Abulayvichitr 8B
Rosemary Aldridge 8B
Charlotte CHEESEMAN 10D
Mike Danechi 8A
Nick Dombernowsky 8A

Running a Form Report (RTF)

Use this report output when you wish to produce a report consisting of one page per record, e.g. letters, forms, etc. Word Forms are produced using Word's Mail Merge facility. A previously created template defines the content and layout of the report and will automatically be selected.

RTF Settings:

Standard Portrait or **Standard Landscape**.
Report Template - Uses an existing report template.

Dietary Needs
Student
Mark Abulayvichitr 8B
Rosemary Aldridge 8B
Charlotte CHEESEMAN 10D
Mike Danechi 8A
Nick Dombernowsky 8A
Adrian Fletcher 8D
Eliza GRIFFITHS 11D
Karen Harcus 8D
Chris Lim 8E
Rochelle Lucas 8E

Running an Excel Report

Use this option to produce a list report in Microsoft® Excel, enabling the data to be further manipulated, or where the numbers of columns exceed that which could be neatly displayed in a Microsoft® Word document. This type of output is particularly suitable for printing reports.

Excel Settings:

Standard Portrait or **Standard Landscape**.

Report Template - Uses an existing report template.

Divider Frequency - Defines the number of records/rows that will be grouped and separated by a horizontal line.

Number of Fixed Columns - Specifies the number of columns that will be repeated on printed continuous pages if there is insufficient room to fit all columns on a single page.

Dietary Needs
Student
Mark Abulayvichitr 8B
Rosemary Aldridge 8B
Charlotte CHEESEMAN 10D
Mike Danechi 8A
Nick Dombernowsky 8A
Adrian Fletcher 8D
Eliza GRIFFITHS 11D
Karen Harcus 8D
Chris Lim 8E
Rochelle Lucas 8E
Suzie O'Neil 8E
Jamie PALFRY 10A
Helen SANDS 9B
Wayne Stevenson 8B
Suong Tsang 8F
Alistaire Yari 8F

Go straight to Print Preview - Opens in Excel's print preview mode.

Group into Separate sheets - The data in the report is listed in groups.

Record Count - Inserts the total number of records in the top left of the report.

Running a Web Page Report

Running a Web Page report exports the report data to an HTML file, which can be viewed through Windows® Internet Explorer. For example, you can use this type of output to maintain a page in your web browser with up-to-date information from SIMS.

Web Page Settings:

Web page - Allows you to specify the location of the web page.

View in browser when web page is created - Optional.

Running a Text Report

Running a Text report exports the report data into a text file.

Text File Settings:

Text file name

Format - Select from Comma Separated, Tab Separated, XML and XML with Schema.

```
"Student"
"Mark Abulayvichitr  8B"
"Rosemary Aldridge  8B"
"Charlotte CHEESEMAN  10D"
"Mike Danechi  8A"
"Nick Dombernowsky  8A"
"Adrian Fletcher  8D"
"Eliza GRIFFITHS  11D"
"Karen Harcus  8D"
"Chris Lim  8E"
"Rochelle Lucas  8E"
"Suzie O'Neil  8E"
"Jamie PALFRY  10A"
"Helen SANDS  9B"
"Wayne Stevenson  8B"
"Suong Tsang  8F"
"Alistaire Yari  8F"
```

Runtime Parameter Values

If the report creator has designed the report to allow Parameter Values to be entered at run-time, an **Enter parameter values for report** dialog is displayed when the report is run or previewed.

Entering report values enables you to restrict and therefore customise the report, e.g. when producing a Birthday List Word report, you may be prompted to specify the pupil/student's status, Year Group and Registration Group/Class.

Clicking in the **Show All** filter check box displays all groups, both active and inactive.

Select the required value from each section.

Alternatively, filter conditions can be bypassed by selecting the appropriate check box(es), e.g. **Accept All (bypass filter conditions)**, to produce a report containing ALL possible values.

Click the **OK** button to run or preview the report.

Additional Report Outputs

Analysis Reports

It is possible to use the data generated by a report for further analysis. Select **Analysis** from the report output drop-down list and run the report in the usual way. There are numerous options that can be applied to customise the analysis display.

Word Mail Merge Reports

A variety of pre-defined reports are available for generating labels, badges, etc. Select Word Mailmerge from the drop-down list and run in the usual way. Please refer to the *Designing and Running Reports* handbook for details of these report outputs.

CAPITA

This guide is based on the version of the software (7.144) in use at the time of publication.