



SIMS

helping
schools
inspire



Designing and Running Reports

Applicable to 7.180 onwards

Revision History

Version	Change Description	Date
7.180 - 1.0	Initial release.	06/02/2018

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Overview

This handbook provides information on steps necessary for previewing, designing, running and storing reports.

SIMS contains a powerful Reporting tool designed using Microsoft® .NET technology. This provides the ability to generate reports via various outputs, for example, HTML, Excel and Internet browsers.

The Reporting tool in SIMS features a 'wizard' to assist with the design and generation of reports. The ability to create reports using Rich Text Format has also been incorporated to enable reports to be designed and run using different word processing packages other than Microsoft® Word.

There are also a number of predefined reports that have been incorporated for users' convenience. These include a student Data Collection Sheet, Record Sheet and Assessment reports, as well as a large number of predefined reports for Special Educational Needs, School Organisation, Staff and Contacts.

Reports that have been created can be saved onto the Document Management Server for your own individual use or made available to other users with sufficient permissions.

What's New in this Release?

Enhancements to the Reporting Dictionary

Reports | Design Report

The **Enrolment Status Changes** sub-report has been added to the reporting dictionary (under **Student | History**).

The **Qualification Type** field has been added to the **Exams** sub-report (under **Student**) (*applicable to Secondary schools only*).

The **Address Note** field has been added to the reporting dictionary (under **Student | Family home**).

Name fields (under **Student | Basic Details**) have been split into **Chosen Names** and **Legal Names** groups.

- The following **Chosen Names** can now be added to a report:
 - **Surname Initial**
 - **Forename & Surname Initial.**

- The following **Legal Names** can now be added to a report:
 - **Initials**
 - **Legal Surname Initial**
 - **Initial & Legal Surname**
 - **Legal Forename & Legal Surname**
 - **Legal Forename & Legal Surname Initial**
 - **Legal Surname & Initial.**

The **Communicator** field has been added to the reporting dictionary (under **Communication**).

The **School Objective** field in the **Objectives** sub-report has been renamed **School Objective Detail**. The **School Objective Summary** field has been added to the **Objectives** sub-report. These amendments enable the reporting on objectives for members of staff (under **Staff | Objective Details**).

Permissions and Licensing Requirements

You need to be a member of one or more of the following System Manager User Groups to ensure you have the permissions required to use the functionality outlined in this handbook.

Process Permissions

There are five types of Process permissions that can be granted for Reporting. These permissions enable access to the various functions available in Reporting in SIMS.

Run Report Permission

Users with this permission can only run reports that have been made public.

Design Report Permission

Users with this permission can open any public or personally created report design or create new reports as required, as well as running any public report.

Administer Reports Permission

Users with this permission can add or delete Report Categories. They can also open any report design made accessible to them and create new reports as required. They can also run any public reports.

Import Reports Permission

Users with this permission can import any reports made available to them.

Export Reports Permission

Users with this permission can export any required reports for use by users with suitable permissions.

Information Domain Permissions

Information Domain permissions enable you to restrict the data that can be viewed by users when they are running reports. It is, therefore, possible to enable users to run reports but to hide certain types of data, such as medical history. Careful consideration must be given to the permissions that you provide to users of the system.

NOTE: Users assigned to the SIMS Manager or SIMS User Groups have access to all data. You may, therefore, wish to remove some Information Domain permissions or create suitable new Groups to which users can be added.

If you have not been given permission to view certain areas of data, such as medical history, the impact is as follows:

When running reports:

- You are not able to view columns of data for which you do not have permission. These are returned as blank in the resulting report.
- You are not able to run a report where a report criteria is used, for which you do not have permission, e.g. where religion = Greek Orthodox.
- You are not able to run a report where a sort order is included for which you do not have permission to view, e.g. sort by Home Language.

When designing reports:

You are not able to include fields in the design of a report for which you do not have permission. Such fields are not made available for selection.

If your permissions have changed since a previously defined report, the fields which you no longer have permission to view are removed and a warning message is displayed advising you of this.

Please contact your System Manager if you are unsure whether you have the applicable permissions.

For more information on setting up permissions, please refer to the *Managing SIMS Users, Groups and Databases* handbook. For a list of the permissions available for each release, please refer to the appropriate Permissions spreadsheet. Copies can be obtained from the My Account (<https://myaccount.capita-cs.co.uk>) website. To find the spreadsheet, search for <sims version> sims permissions spreadsheet, e.g. 7.178 sims permissions spreadsheet.

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Introduction

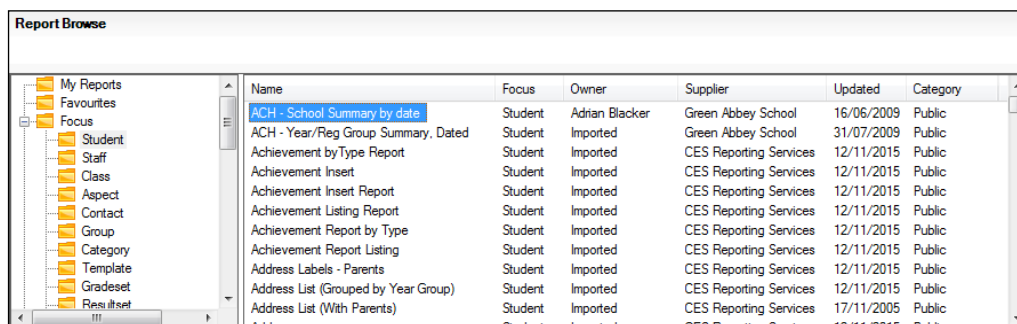
Existing reports can be previewed in SIMS and also processed in any of the following ways:

- as a list displayed in Microsoft® Word, Excel or Internet Explorer
- as a series of forms, e.g. mail merged letters in a Word document
- as a text file (comma separated, tab separated or XML)
- as information which can be used for statistical analysis.

Reports that have already been designed by other users can be made Public so that they become available to the majority of users. Depending on how the original reports were designed, it may be possible in some instances to change the Report Output, i.e. how the report looks when it is printed and to modify the records that are displayed. To enable users to see how a report looks before finally printing it and to enable changes to be made to the records displayed, there is a Preview Mode available in the Reporting tool. Becoming familiar with the various ways a report can be modified in Preview Mode makes designing your own specific reports much less complicated.

On the left-hand side of the window, there are four report Category folders, in which various different types of reports are stored. Click the + button next to the Focus folder to expand the list of folders available.

If other users have previously defined some reports or the Predefined reports have already been imported, there are some existing reports available for you to preview.



Name	Focus	Owner	Supplier	Updated	Category
ACH - School Summary by date	Student	Adrian Blacker	Green Abbey School	16/06/2009	Public
ACH - Year/Reg Group Summary, Dated	Student	Imported	Green Abbey School	31/07/2009	Public
Achievement by Type Report	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Insert	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Insert Report	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Listing Report	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Report by Type	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Report Listing	Student	Imported	CES Reporting Services	12/11/2015	Public
Address Labels - Parents	Student	Imported	CES Reporting Services	12/11/2015	Public
Address List (Grouped by Year Group)	Student	Imported	CES Reporting Services	12/11/2015	Public
Address List (With Parents)	Student	Imported	CES Reporting Services	17/11/2005	Public
Address...	Student	Imported	CES Reporting Services	12/11/2015	Public



More Information:

Importing Predefined Reports on page 62

Previewing Reports

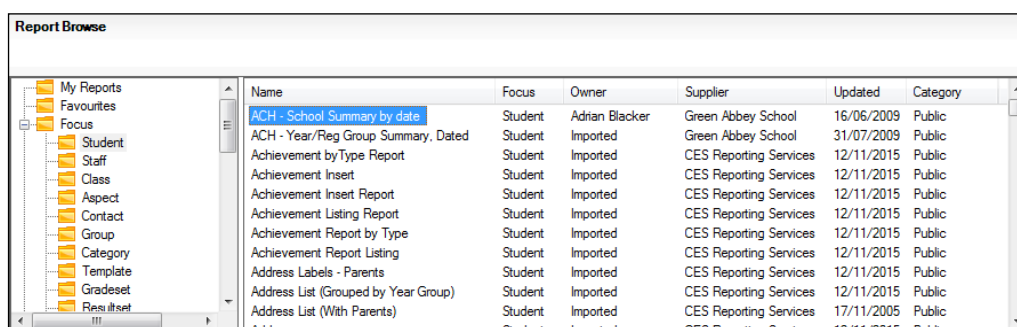
The Report Preview option gives users the opportunity to check that the data returned meets their requirements before producing the final report output. Once a report is in **Preview** mode, it is also possible to add or remove records from the preview. Any amendments are reflected in the final output, although not saved with the original report design. In addition, the sort order can be changed, which is also reflected in the final report output.

It is possible to change the content and order of a report on an ad-hoc basis. This is particularly useful when producing a report of children attending a school trip. You can then add or remove pupil/students who may/may not be able to attend.

Selecting a Report

1. Select **Reports | Run Reports** and use the navigation tree to locate the folder in which the required report is stored.

Expand and contract the folder structure by clicking the + or - buttons until the required folder is visible.



Name	Focus	Owner	Supplier	Updated	Category
ACH - School Summary by date	Student	Adrian Blacker	Green Abbey School	16/06/2009	Public
ACH - Year/Reg Group Summary, Dated	Student	Imported	Green Abbey School	31/07/2009	Public
Achievement by Type Report	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Insert	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Insert Report	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Listing Report	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Report by Type	Student	Imported	CES Reporting Services	12/11/2015	Public
Achievement Report Listing	Student	Imported	CES Reporting Services	12/11/2015	Public
Address Labels - Parents	Student	Imported	CES Reporting Services	12/11/2015	Public
Address List (Grouped by Year Group)	Student	Imported	CES Reporting Services	12/11/2015	Public
Address List (With Parents)	Student	Imported	CES Reporting Services	17/11/2005	Public
Address...	Student	Imported	CES Reporting Services	12/11/2015	Public

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

NOTE: The availability of reports depends on the permissions assigned to you and whether report designs have been made Public. Permissions can also be applied to specific data fields and therefore it is possible that some reports can be produced, but may include some blank columns.

The reports displayed can be sorted by clicking the appropriate column header, e.g. **Name**, **Owner**, **Updated**, etc.

2. Highlight the required report name and click the **Preview** button to view the report.
3. The system may prompt you to **Enter Parameter Values** in order to restrict the amount of data returned.
4. Click the **OK** button to produce the report.

The length of time required to generate the report preview depends on the complexity of the report design and any additional report criteria that are selected.

Adding a Report as a Favourite

A report can be added as a favourite so it is available from **Reports | Run Report** and selecting the Favourites folder. Adding a report as a favourite also makes the report available from the **My Favourite Reports** panel on the SIMS **Home Page**.

1. Select **Reports | Run Report** to display the **Report** browser.
2. Navigate to the folder containing the required report(s), e.g. **Focus | Student**. Alternatively, a report under **My Reports** can be made a favourite by navigating to the **My Reports** folder.
3. Highlight the required report(s), right-click the selection then select **Add to favourites** from the pop-up menu. Multiple reports can be selected, if required.
4. Check that the report(s) have been added by clicking the Favourites folder in the **Report** browser.
5. Re-open SIMS to display the report(s) in the **My Favourite Reports** panel on the SIMS **Home Page**.

Entering Parameter Values

When a report is designed, it is possible to apply various criteria to limit the records returned. For example, a report could be limited to all the pupil/students in a particular year.

To provide greater flexibility, it is also possible to enter values for these criteria when an existing report is run. You could for example, be prompted to select the **Years** that you wish to be included in the report. This enables you to run the same report, selecting a different year each time.

If a report has been set up in this way, when prompted to enter **Run Time Parameters**, enter values, such as **Surnames**, choose existing values by selecting appropriate check boxes or specify a required date.

The screenshot shows a dialog box titled "Enter parameter values for report" with a SIMS logo. It contains three filter sections:

- Student Status is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "On Roll", "Leaver", "Pre-admission", and "Leaver (Deceased)". There is also an "Accept All (bypass filter condition)" checkbox.
- Year group is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "Year 7", "Year 8", "Year 9", "Year 10", and "Year 11". There is also an "Accept All (bypass filter condition)" checkbox.
- Reg group is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "10A", "10B", "10C", "10D", and "10E". There is also an "Accept All (bypass filter condition)" checkbox.

At the bottom right are "OK" and "Cancel" buttons.

Users can refine the report using the **Show All** filter. This option is available when defining the run-time parameters and when designing a new report and specifying a new filter.

The **Show All** filter is switched off by default, thus ensuring that only active groups are displayed for selection.

Clicking in the **Show All** filter check box displays all groups, both active and inactive. For example, Year Groups and Registration Groups that are no longer in use and have been removed from the Pastoral Structure, can be selected and included in the report.

Click the **OK** button to continue.

The report appears in the **Preview Report Results** panel together with the name of the report that you have selected.

*NOTE: You can increase the size of the **Preview Report Results** panel by dragging the horizontal line above the report name until the required size is achieved.*

Report Browse

Name	Focus	Owner	Supplier	Updated	Version
Behaviour Report by Time	Student	Imported	CES Reporting Services	05/11/2015	
Behaviour Report by Type	Student	Imported	CES Reporting Services	05/11/2015	
Behaviour Report Listing	Student	Imported	CES Reporting Services	05/11/2015	
Birthday List	Student	Imported	CES Reporting Services	05/11/2015	
CES Assessment: Results - Res. Set & Yr	Student	Imported	CES Reporting Services	05/11/2015	
CES Assessment: Student - Result by Date	Student	Imported	CES Reporting Services	05/11/2015	
Contact List with Daytime Information	Student	Imported	CES Reporting Services	17/11/2005	
Contact List with Main Telephone Number	Student	Imported	CES Reporting Services	05/11/2015	
Cultural and Ethnic Information	Student	Imported	CES Reporting Services	05/11/2015	
Data Collection Sheet	Student	Imported	CES Reporting Services	05/11/2015	
Data Collection Sheet	Student	Imported	209 4421 Test Primary ...	17/11/2005	
Data Collection Sheet	Student	Imported	Green Abbey School	25/07/2012	

Preview Report Results

Details Extend Exclude View... View: Selected Rows: 160 Run

Surname	Forename	Year	Reg	DOB	Age (y)	Days to next birthday
Jackson	Madison	Year 7	7F	03/02/2004	12y 0m	0
Horeman	Dustin	Year 7	7E	05/02/2004	11y 11m	2
Smith	Geoff	Year 7	7E	07/02/2004	11y 11m	4
Davis	Stephen	Year 7	7E	08/02/2004	11y 11m	5
Anton	Tiger	Year 7	7A	09/02/2004	11y 11m	6
Acton	Jordan	Year 7	7F	11/02/2004	11y 11m	8
Anderson	Ethan	Year 7	7F	11/02/2004	11y 11m	8
Barnett	Gary	Year 7	7B	14/02/2004	11y 11m	11
Barnett	Gemma	Year 7	7F	14/02/2004	11y 11m	11
Barnett	Jamie	Year 7	7A	14/02/2004	11y 11m	11
Sheanwood	Adam	Year 7	7C	14/02/2004	11y 11m	11
Adebayi	Emmanuel	Year 7	7F	15/02/2004	11y 11m	12
Jordan	Michael	Year 7	7F	15/02/2004	11y 11m	12
Koster	Sophia	Year 7	7A	18/02/2004	11y 11m	15

If you are happy with the data returned in the report, click the **Run** button to generate the report.

Changing the Preview Sort Order

By default, the report is previewed in the order that was defined in the original report design. It is possible however, to order the data in any column in the display by clicking the column heading. This activates a toggle function that orders the data in the chosen column in ascending and descending order, i.e. clicking the **Forename** column arranges the display of students' names in alphabetical order by their forename.

*NOTE: Any changes made to the sort order when in **Preview** mode are reflected in the final report output.*

Adding and Removing Records in Preview Mode

There may be occasions when you wish to remove records from those returned in the report. For example, a report has been created that lists the pupil/students in Year 10, studying French, who are going on a trip to France. Several of the pupil/students are subsequently unable to attend and need to be removed from the original report. This can be achieved by **Excluding** the appropriate records.

Alternatively, you may wish to include records that were outside the original report criteria. Using the previous example, you could add pupil/student records to the report to replace the original pupil/students who are unable to attend the trip to France. This can be achieved by **Including** the additional records.

Adding Records in Preview Mode

1. Click the **Extend** button.
This begins a search of the database for all available records within the **Focus** of the report, e.g. students. A message is displayed, indicating that the report is being generated. All available records within the focus are extracted.
2. View the extended records by clicking the **View** button and selecting **Excluded**. The newly extracted records are denoted by an **X (Extended)** symbol in the first column.
3. Highlight the records to be included in the report preview by holding down the **Ctrl** key and clicking the row.
To highlight sequentially listed records, click the first record and hold down the **Shift** key until you reach the last record required. Alternatively, double-click records to include them. A combination of methods may be used as necessary.
To view the details of a particular record, right-click it and select **Details** from the pop-up menu.
4. Click the **Include** button to add the highlighted records. These records no longer appear in the **Excluded** view.
5. To check that the records have been successfully included, click the **View** button again and select **Selected**. All included records are identifiable by an **& (Included)** symbol in the first column.

Removing Records in Preview Mode

1. Click the **View** button and ensure that **Selected** is chosen from the drop-down list.
Highlight the records to be excluded from the report preview by holding down the **Ctrl** key and clicking the row. To highlight sequentially listed records, click the first record and hold down the **Shift** key until you reach the last record required. A combination of methods may be used as necessary.
2. Click the **Exclude** button to remove the highlighted records from the **Preview** display. Alternatively, right-click a particular record and select **Exclude** from the drop-down menu.
3. To check that the records have been successfully excluded, click the **View** button and select **Excluded**. All excluded records are identifiable by an **R (Removed)** symbol in the first column.

Changing the Preview Mode View

By default, only records extracted using the original report definition are displayed in a report **Preview**. If you have added and/or removed records, you can view all available records at any stage by clicking the **View** button and selecting **All**.

The display includes all records, i.e. those from the original report selection, together with any that have been added or removed. The records to be included in the report are shown on a white background whilst those that have been either added or removed when the Preview list was extended, are highlighted in grey.

The symbols shown in the first column indicate the following:

No symbol	&	R	X
Original report selection record.	Record added to the original report selection.	Record removed from the original report selection.	Record not included in the original report selection and not required (excluded).

You can also restrict the view to **Selected** records and **Excluded** records only, by selecting the appropriate option from the **View** button drop-down list.

Toggling Records in Preview Mode

When listing records in the **All** view, it is possible to change the status of a record using the **Toggle** button.

Toggling changes the record status to the opposite of its current status and can be a useful method of quickly changing current selections. For example, if a record has been **Excluded** (denoted by an **X**), clicking the **Toggle** button selects that particular record and changes the symbol to an **&** (**Included**).

Running Reports

Reports can be run from both the **Run Reports** window and the **Design Reports** window. The reports available depends on which reports have been made Public and what permissions have been assigned to you. You may wish to preview a report to add/remove records as required.

Opening the Required Report (Run Mode)

1. Select **Reports | Run Report** to display the **Reports** browser.
2. Use the navigation tree to locate the folder in which the required report is stored. All reports in the selected folder are displayed in the right-hand panel. Expand and contract the folder structure by clicking the **+** or **–** buttons as required.
3. Highlight the required report name and double-click it to display the **Enter Parameter values for report** dialog. Specify the parameters and click the **OK** button.
4. If applicable, select the type of output required before running the report.

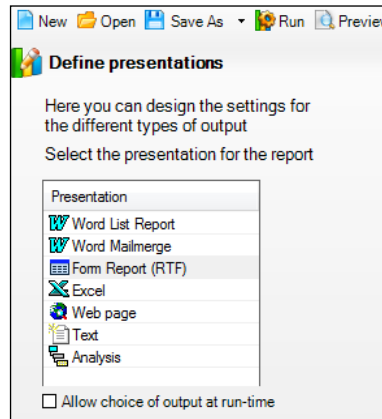


More Information:

Entering Parameter Values on page 56

Selecting the Report Output Type

It is frequently possible to specify how you would like the report to be presented before printing commences. Select an option from the list.



There may be occasions when the type of report output has been preselected by the person who designed the report. If this is the case, you are not able to change the report output type from the option originally specified.

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 number of columns exceeds that which could be neatly displayed in a Word document. This type of output is particularly suitable for printing reports.

1. Select **Reports | Run Report** to display the **Reports** browser.
2. Use the navigation tree to locate the folder in which the required report is stored. All reports in the selected folder are displayed in the right-hand panel. Expand and contract the folder structure by clicking the + or – buttons as required.

Highlight the required report name and click the **OK** button.

*NOTE: If the **Allow choice of output at runtime** option was selected when the report was designed, you can select the output type before the report is run.*

3. Select **Excel** from the drop-down list and then click the **Run** button.
4. The report is either displayed directly in **Excel** or you are prompted to enter the run-time parameters, if these were not specified when the report was designed.

Run-time Parameter	Definition
Standard Portrait/Standard Landscape	Select the required radio button to choose the required orientation.
Report Template	Select this radio button if you wish to use a report template instead of a portrait or landscape output.

Run-time Parameter	Definition
Allow these settings to be changed at run-time	Select this check box if users are able to change the report output when the report is printed.
Divider Frequency	This defines the number of records/rows to be grouped and separated by a horizontal line. Increase or decrease the figure as required using the Up and Down arrows.
Number of Fixed Columns	This specifies the number of columns repeated on printed continuous pages if there is insufficient room to fit all columns onto a single page. Increase or decrease the figure as required using the Up and Down arrows.
Go straight to Print Preview	Select this check box if you want the report to open in Excel's print preview mode.
Group into Separate sheets	Select this check box if you want the data in the report to be listed in groups. Where a report has been appropriately designed, it is possible to separate an Excel report into groups of data, with each group displayed in a separate Worksheet.
Record count	Select this check box to insert the total number of records in the top left of the report, preceded by the text entered in the adjacent field (Defaults to Records). Click the OK button to produce the report in Excel.


More Information:
Defining Excel Reports on page 39
Setting up a Group of List Reports for Excel on page 41

Running a Word List Report

Use this report output only if your list report fits 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 Word template).

1. Select **Reports | Run Report** to display the **Reports** browser.
Use the navigation tree to locate the folder in which the required report is stored. All reports in the selected folder are displayed in the right-hand panel. Expand and contract the folder structure by clicking the **+** or **–** buttons as required.
2. Highlight the required report name and click the **OK** button.
If the **Allow choice of output at runtime** option was selected when the report was designed, you are required to select the output type before the report can be run.
3. Select **Word List Report** from the drop-down list and then click the **Run** button. You may be prompted to enter run-time parameters in order to restrict the amount of data returned, if these were not specified in the original report design.

- The report is either displayed directly in Word for Windows or you are presented with a set of options via a Word List dialog.

Run-time Parameter	Definition
Standard Portrait/Standard Landscape	Select the required radio button to choose the required orientation.
User-defined Template	Select this radio button if you wish to use a user-defined template instead of a portrait or landscape output.
Allow these settings to be changed at run-time	Select this check box if users are able to change the report output when the report is printed.



More Information:

Defining Word List Reports on page 30

Creating a New Word List Report Template (Run Mode)

List reports can be produced by merging the data from the report with a Word document (based on an associated template). You can select or edit an existing template or create a new template. New templates are based on an existing base template.

- From the **Word List** dialog, click the **New** button to display the **Select Base Template** dialog.
- Select the required base template by clicking the appropriate folder name. Any existing templates are displayed in the right-hand panel. Click the required template name, then click the **OK** button.
- Edit the template as required.

Two merge fields are visible - <REPORT TITLE> and <REPORT TABLE>. You can do any of the following:

- Format these fields to change the appearance of the resulting report text, e.g. colour, bold, italics, etc. The fields can also be repositioned, although this should be done with care to ensure the resulting report data fits on the page.
 - Insert logos, graphics and any other additional text.
 - Change margins, page formatting, etc.
- Click the **Save** button on the Word toolbar then close down Word. You are returned to the **Word List** dialog.
 - Overtyping the file name **New List Report** in the **File Name** field.
 - Click the **OK** button to produce the report.

Running a Word Form Report (RTF)

Use this report output when you want to produce a report consisting of one page per record, e.g. letters, forms, etc. You may wish to preview the report to check the content before running.

Word Forms are produced using Word's mail merge facility. A previously created document defines the content and layout of the report and is automatically selected.

1. Select **Reports | Run Report** to display the **Report** browser.
2. Highlight the required report.
If the **Allow choice of output at run-time** option was selected when creating the report design, you are required to select the output type before the report can be run.
3. Select **Form Report (RTF)** from the drop-down list and click the **Run** button.

Word is launched and a separate page is created for each record in the report.

You may be prompted to select a suitable template (i.e. Landscape or Portrait) if this is not specified in the report design.

Run-time Parameter	Definition
Standard Portrait/Standard Landscape	Select the required radio button to choose the required orientation.
User-defined Template	Select this radio button if you wish to use a report template instead of a portrait or landscape output.
When editing user-defined templates, use Word with macro support field names	Select this check box if appropriate.
Allow these settings to be changed at run-time	Select this check box if users are able to change the report output when the report is printed.



More Information:

Specifying Page Breaks on page 36

Specifying Sub Tables and Report Inserts on page 37

Running a Text Report

Running a Text report exports the report content into a text file. You may wish to preview the report to check the content before running.

1. Select **Reports | Run Report** to display the **Reports** browser.
If the **Allow choice of output at runtime** option was selected when creating the report design, you are required to select the output type before the report can be run.
2. Select **Text** from the drop-down list and then click the **Run** button.
The report is either exported and saved as a text file automatically (a message dialog appears displaying the file name) or you are prompted to enter run time parameters, if these were not specified in the report design.
3. Enter a file name for the text file in the **File Name** field or click the **Browse** button and navigate to the destination of the required file.
4. Select the required type of text file **Format** from the following options:
 - Comma Separated (CSV)
 - Tab Separated
 - XML (no schema)
 - XML (with schema).

5. Click the **OK** button to produce the report.

Running a Web Page Report

Running an HTML report exports the report data to an HTML file which can be viewed through Internet Explorer. You may wish to preview the report to check the content before running.

1. Select **Reports | Run Report** to display the **Reports** browser.
If the **Allow choice of output at runtime** option was selected when creating the report design, you are required to select the output type before the report can be run.
2. Select **Web page** from the drop-down list and then click the **Run** button.
The report is either opened immediately in Internet Explorer® or you are prompted to enter your chosen location for the Web page.
3. Enter a **Web page** address to save the report as .HTM or .HTML in the **Web Page** field or click the **Browse** button to navigate to an existing file.
4. Select the **View in browser when web page is created** check box if you want to view the report straight away.
5. Select the **Allow web page location to be chosen at run-time** check box if users are able to specify this themselves when the report is run.
6. Click the **OK** button to produce the report.



More Information:

Defining Web Page Reports on page 41

03/ Designing Reports

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Using the Report Designer

There are three possible options available in the Report Designer. The first and most complex of these, is the option to **Create a New Report**. Only users with suitable permissions can design new reports.

It is also possible to **Open an Existing Report** that has been made public by its 'creator' so that it can be edited and saved with a different name by other users.

The option to **Import a Report** enables you to access a large number of predefined reports that have been created by Capita Children's Services and other external agencies. These reports can be edited and then saved with an alternative name.

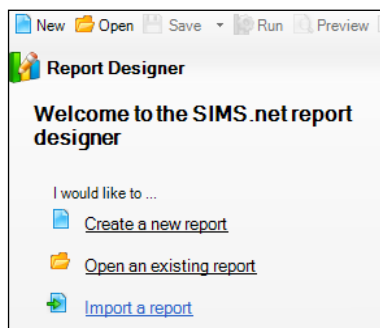
Create a New Report

Select this option if you want to create a new report. The **Select Data Area** panel of the Report Designer is displayed, enabling you to start selecting the report design criteria.

Open an Existing Report

Select this option if you want to open an existing report to edit the criteria or view the report summary.

The **Open Report** dialog is opened, enabling you to browse to the location of an existing report.



Import a Report

Select this option to display the **Import Reports** dialog, enabling you to import a previously created report from an alternative location.

Before creating or running a report designed by another user, it is advisable to import the selection of predefined reports that have been provided for use with this version of the Reporting tool. This gives you an idea of the reports that are already available and the data fields that they contain and should make designing new reports far easier for first time users.

Creating a New Report

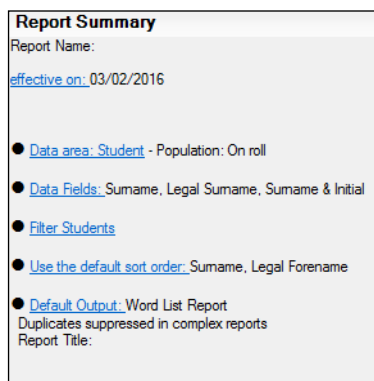
There are five key processes involved in designing a report. The Report Designer guides you through these processes in chronological order but previous stages can be revisited at any point by clicking the **Back** button until you reach the required screen.

The Report Summary

As you proceed with designing a new report, a **Report Summary** is displayed in the bottom left-hand corner of the page.

This summary is updated each time you make a data selection.

Once all aspects of the report definition have been made, you can review your choices at a glance by checking the details in the **Report Summary**.



You can also revisit any individual report design area by clicking the relevant hyperlink text in the **Report Summary**. This enables you to change your original selection (apart from the **Data Area**), enabling you to modify the report data before running the report.

Selecting the Data Area (Report Rows)

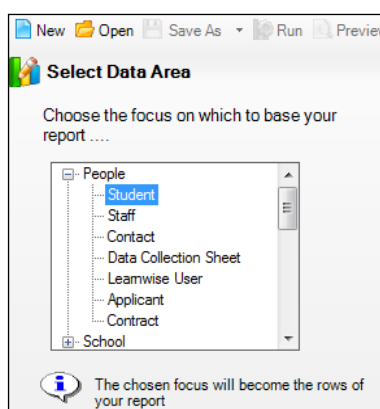
1. Select **Reports | Design Report** to display the **Report Designer**.

Select the **Create a new report** option. After selecting to create a new report, you are presented with the **Select Data Area** panel.

The **Data Area** is the focus on which your report is based, i.e. People, School or Agency.

As a result, once you have selected a data area it is not possible to change it for the report you are currently creating.

In order to select a different data area, you must save or abandon the current report, close down the **Report Designer** and create a new report by selecting **Reports | Design Report** from the top Menu Bar again.



2. In the **Select Data Area** panel, highlight the required focus by expanding and contracting the navigation tree and click the **Next** button. Alternatively, double-click the required focus to select it.

The chosen focus, e.g. **People | Student**, **School | Class**, form the **Rows** of the report.

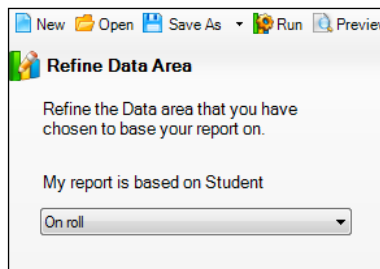
Refining the Data Area

Depending on the Data Area you have selected and permissions assigned to you, you may be given the option to further refine the Data Area by the selection of a subset of that area – the **Population**.

Where the report is based on **Student** information, the Data Area Population can be refined to:

- On-Roll
- Accepted Pre-admissions
- Leavers
- All students
- Leavers (Deceased).

Select the required population from the drop-down list and click the **Next** button to display the **Select Data Fields** panel.



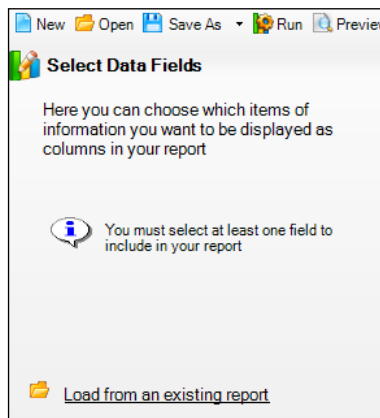
Selecting the Data Fields (Report Columns)

The **Select Data Fields** panel of the **Report Designer** enables you to select items of information (**Data Fields**) for the report and the order in which the information is displayed. These items of information are displayed in the report as **Columns**.

Selecting the **Data Fields** is achieved by choosing the required data fields (columns) from those available.

The **Data Area** (focus) chosen previously for the report determines which fields are now available for inclusion.

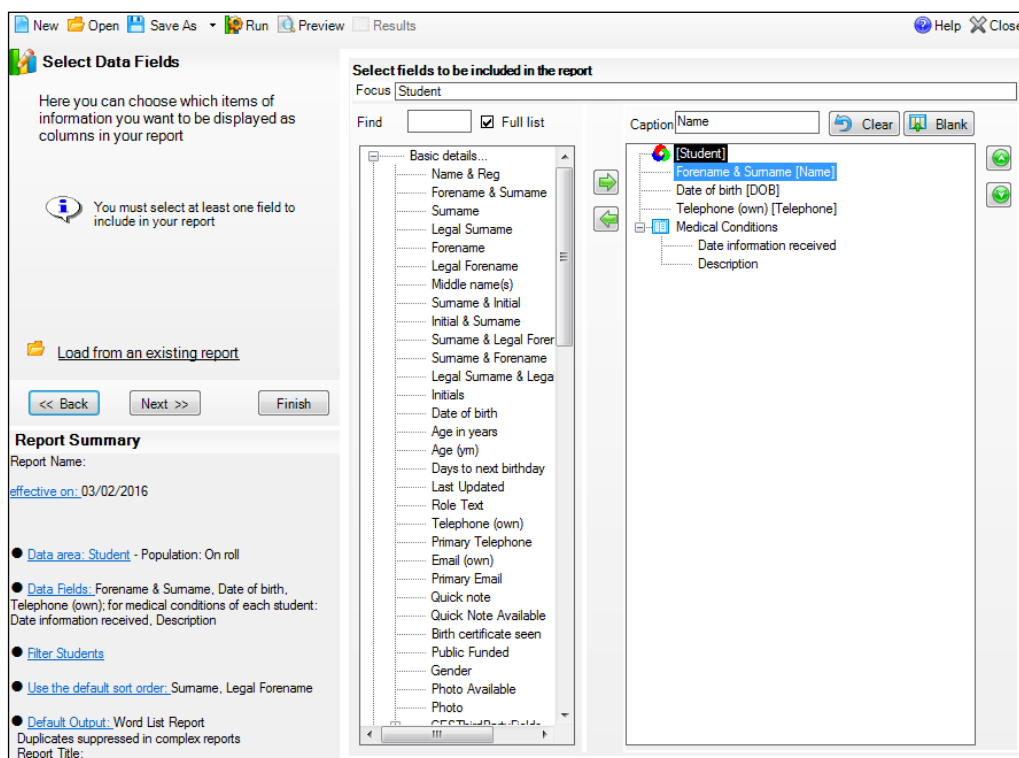
For example, selecting **Student** and **On-Roll** as the focus of your report populates the **Select Fields to be included in the report** panel with student related criteria, e.g. Registration and SEN information.



It is also possible to load Data Fields from an existing report by clicking the **Load from existing report** hyperlink.

1. Select the required field(s), one at a time, by expanding and contracting the navigation tree.

Alternatively, double-click a field group name, e.g. **Basic Details** to view all the criteria contained within this field group. Either double-click the required field or click the **Right Arrow** button to select it as a report column. The selected field is now displayed in the right-hand panel.



The **Focus Bar** in the **Select fields to be included in the report** panel displays the name of the **Data Area** (Focus) previously selected, i.e. the entity on which your report is based.

To save time expanding and contracting the navigation tree in search of particular criteria, enter the criteria name into the **Find** field. The navigation tree is expanded to display the first recognised field that matches the letters entered.

The **Full List** check box always defaults to **Yes**, so that all Data Fields are available for selection.

The **Caption** field displays whichever criterion is currently highlighted in the right-hand side of the panel. It is possible to change the name or **Caption** of a particular **Data Field** (column title) by highlighting the appropriate **Data Field** from the right-hand panel and editing the name. The new name then becomes the column title and is displayed in square brackets, adjacent to the field name.

2. Select as many **Data Fields** as required to provide the information needed in this report.

*NOTE: You must select at least one **Data Field** to include in the report.*

If you make a mistake at any time, highlight the incorrect selection in the right-hand panel and use the **Left arrow** button to remove the criterion. You can also change the order in which the columns appear in your report by using the **Up** and **Down arrow** buttons to shuffle the Data Fields around until you are satisfied with how your report looks.

If you decide that all of the Data Fields you have selected do not produce a satisfactory report, click the **Clear** button to remove all previous selections and start again.

If you want to insert a blank column into your report, e.g. for tick boxes on data capture forms, click the **Blank** button to add a **[Blank column]** to the bottom of the selected Data Fields.

Inserting Related Fields (Sub Reports)

It is possible to insert **Related fields** into reports (if required). For students, this could include related Classes, Contacts, Assessment Results, etc. Once included, you can also apply additional criteria to these fields to restrict the data returned. Related fields are located in the lower section of the navigation tree and are denoted by the blue grid icon.



Related Fields icon

For example, you may wish to produce a report that lists all the students in the school who have a medical condition and are in classes with a size greater than 26. This would enable you to pinpoint any students with medical conditions who attend several classes with a large class size.

The report currently contains fields from the **Student Focus** but you would also want to report on fields from **Classes** and **Medical Conditions**. Therefore, you must use related fields in order to generate the report. A related field is known as a **sub report**.

Additional report criteria can also be added to a sub report by highlighting the sub report and clicking the **Define settings for this Sub report** button.



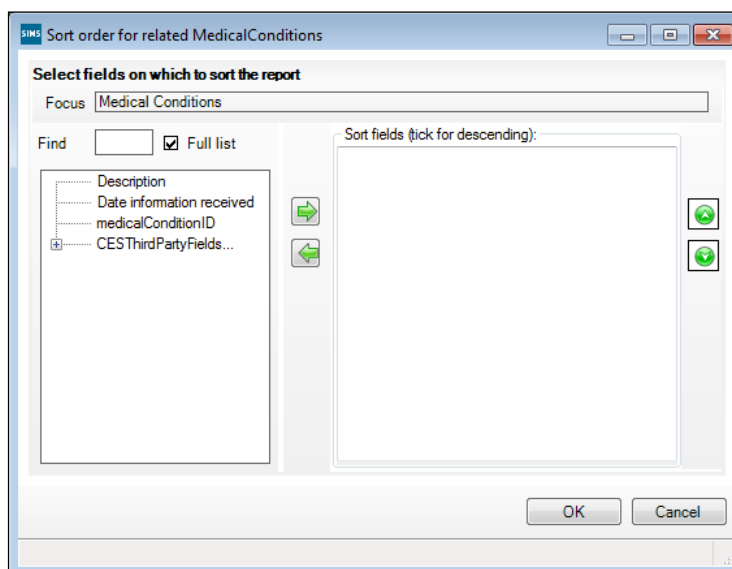
Define settings for this Sub report button

Alternatively, double-click the sub report to display the **Selection criteria** that relates to the area that you have selected (if any).

Defining the Sort Order for the Sub Report

You can define the sort order by clicking the **Define** button adjacent to the **Sort Order** field to display the **Sort order for related** dialog.

You can change the order in which the fields appear in your report by using the **Up** and **Down** arrow buttons. Either double-click the required field or use the **Right** arrow button to select it. The selected field is now displayed in the right-hand panel.



Including Records with no Such <Item in the Report>

Select the **Include records with no such...** (named according to the related area you have selected) check box.

Displaying the First Record only <in the Report>

Select the **Display first record only** check box (if required).

For example, if you wish to list a student's best marks in Maths, English and Science, set up an assessment result where the subject = Maths, then order by grade value (descending) and select the **Display first record only** check box.

The next column can be set up in the same way except that the subject should = English. The third column can be set up in the same way but the subject should = Science.

A sub report can be duplicated and then edited, if required. Highlight the sub report and click the **Define the settings for this sub report** button.

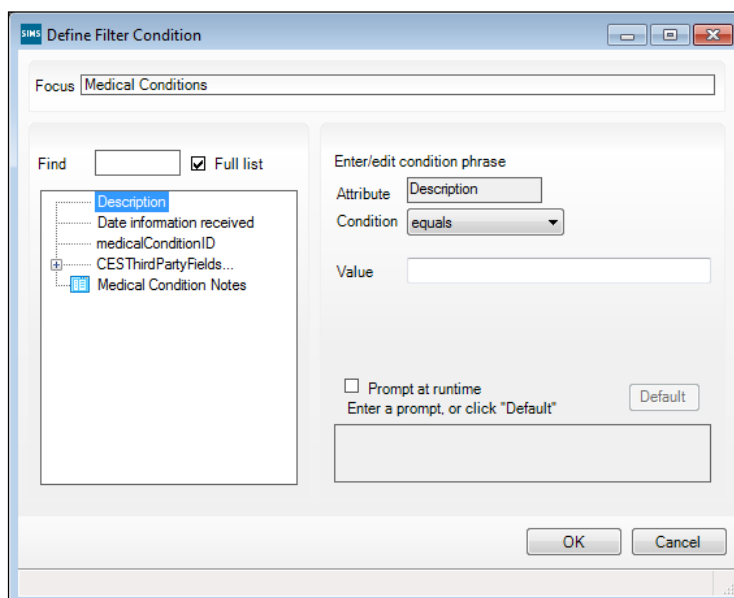


Duplicate the selected Sub report button

NOTE: The **Duplicate Sub report** button and **Define settings for this Sub report** button is only be visible when **Related fields** have been selected.

Applying Report Filter Conditions to the Sub Report

You can apply report filters to **Related fields** in order to restrict the records returned in the report output. The process of selecting the filter consists of selecting the **Attribute**, specifying the **Condition**, e.g. Equals, Greater than, etc. then entering a **Value**. Each Attribute/Condition/Value set is referred to as a clause. It is possible to add many different clauses.



When you have selected all the **Data Fields** required and any additional report criteria, click the **Next** button to display the **Apply Filters** panel.



More Information:

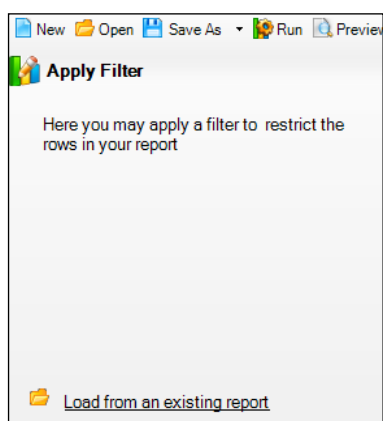
Adding an AND Clause on page 27

Applying Report Filters

Report Filters are used to restrict the records returned in the report output.

For example, you may wish to limit the number of pupil/students returned in a **Student** report according to their age, gender, registration group, etc. This can be achieved by using filters. Unless you wish to include all available records within the chosen report data area (e.g. all pupil/students), you need to restrict the records returned by applying report filters, e.g. pupil/students in Year 10 who have a Statement of Special Needs.

The filter condition consists of an **Attribute**, **Condition**, **Value** and **Prompt set** and is referred to as a **Clause**. It is possible to add many different clauses.



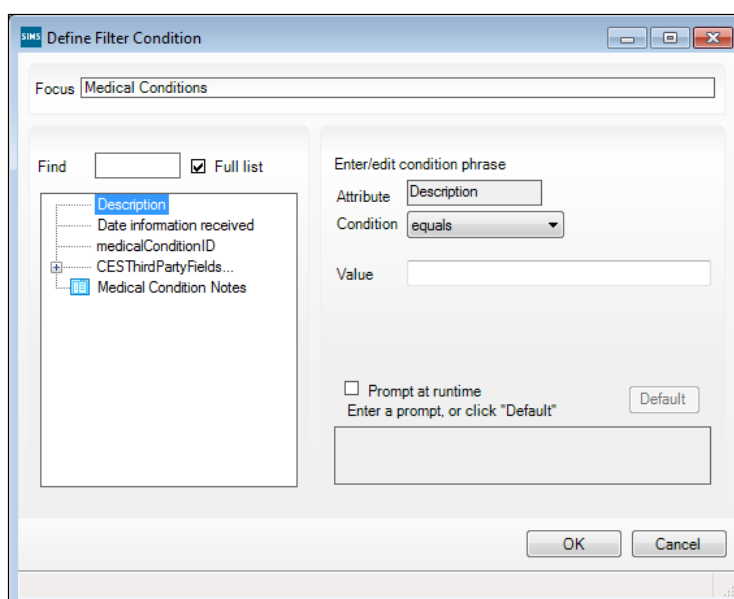
More Information:

Adding an AND Clause on page 27

Defining New Filter Conditions

The report records returned can be restricted further using the **Define Filter Condition** dialog (available from the **Apply Filter** area of the **Report Designer**).

1. Click the **New** button to display the **Define Filter Condition** dialog. The icon that represents the **New** button is the same as the icon used for Related Fields.



2. Select the **Attribute** to add the filter to by selecting from the navigation tree.
3. Click +/- to expand/contract the tree until the required field can be seen. Alternatively, double-click a **Field Group** name to expand/contract the tree.

The **Find** field and **Full list** facility can be used to help search for a specific attribute. To search for a field name, enter the name in the **Find** field. The tree is expanded to display the first field matching the letters entered.

The **Enter/edit condition phrase** options change according to the **Attribute** selected.

4. Select a **Condition** from the drop-down list.

For example, if the **Age** field is selected, conditions are made available for number fields, i.e. Equals, Does Not Equal, Less Than, Greater Than and Between.

Where the chosen attribute contains a set of possible values (lookup codes), users can click the **Select All** button to include all the active values in the report. Fixed lookups, such as **Gender**, are always considered active.

If you make a mistake, the selections can be removed by selecting the **Clear All** button.

The **Show All** filter check box can also be selected. This displays both the active and inactive lookup values for inclusion in the report.

5. Add a prompt (if required). This facility enables you to delay specifying the **Value** of the filter until the report is actually run. The prompt is then displayed.
6. Select the **Prompt at runtime** check box. A default prompt is displayed in the field below, which can be amended, if required.
7. To return to the default prompt, click the **Default** button.
8. Click the **OK** button to return to the **Define Filter** panel.

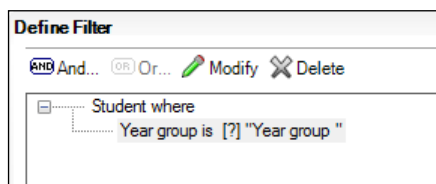


More Information:

Report Criteria Conditions on page 44

Modifying an Existing Filter Condition

1. From the **Define Filter** panel, highlight the filter condition to be modified and click the **Modify** button to display the **Define Filter Condition** dialog.



2. Edit the **Condition**, **Value** and **Prompt** at run-time text.

NOTE: The Attribute cannot be altered at this stage.

3. Click the **OK** button to return to the **Define Filter** panel.
4. Save the current filter definition.
5. Additional clauses can now be added.



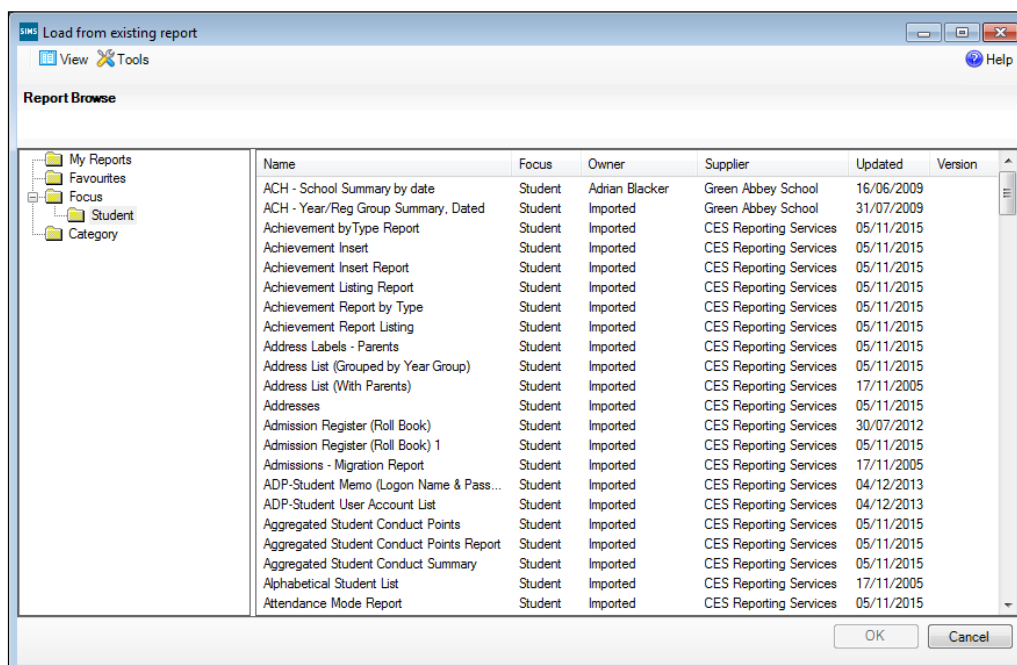
More Information:

Adding an AND Clause on page 27

Loading an Existing Filter Condition from an Existing Report

The process of defining the report criteria for a report can be complex. It can, therefore, be useful to open previously saved definitions that were used with similar reports and use these as the basis of your new report.

1. Click **Load from an existing report** to display the **Load from existing report** dialog.



2. Click the appropriate folder name. Any existing reports stored in the selected folder are displayed in the right-hand panel.
3. Select **View** and then select the required option from the resulting menu. Alternatively, click in the right-hand panel and select from the pop-up menu.

The report can be viewed in the following modes:

- **List**
 - **Icons**
 - **Details** - name of report, the focus that the report is based on (e.g. Student), report owner, (e.g. Mark Smith), report supplier, (e.g. Longham School) and the date that the report was last updated.
4. Highlight the required report name and click the **OK** button. The relevant criteria for that report are loaded into the area of the **Report Designer** you are in. Alternatively, double-click the report name.

Adding an AND Clause

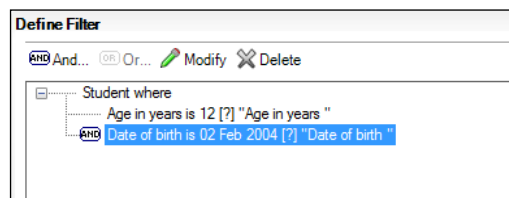
Additional clauses can be added to any existing clause. These are inserted using the **AND** option and records are only returned if they pass both clauses.

In addition, combinations of **AND** and **OR clauses** can be used.

1. Select the required **Attribute**, **Condition** and **Value** as described in **Defining New Filter Conditions**.

2. From the **Define Filter** panel, highlight the **Focus**, which is followed by the word 'where' to which you wish to attach the additional clause.
3. Click the **AND** button to display the **Define Filter Condition** dialog.
4. Add the **AND** clause using the same method used when defining the original filter condition.
5. Click the **OK** button to return to the **Define Filter** panel.

The **Define Filter** panel is updated to include the new clause, which is appended to the existing clause and preceded by the word **AND**. Further clauses can be added, if required.



Adding an OR Clause

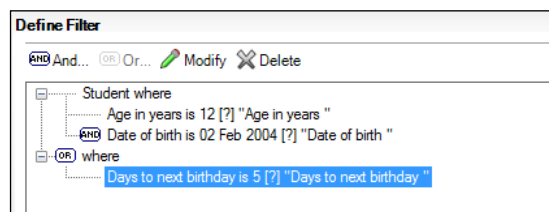
1. Select the required **Attribute**, **Condition** and **Value** items (please see *Defining New Filter Conditions* on page 25).
2. From the **Define Filter** panel, highlight the **Focus**, which is followed by the word 'where', to which you wish to attach the additional **Clause**.
3. Click the **OR** button to display the **Define Filter Condition** dialog.
4. Add the **OR Clause** using the same method used when defining the original Filter Condition.
5. Click the **OK** button to return to the **Define Filter** panel.

Adding Combinations of AND/OR Clauses

It is possible to join several clauses together with an **AND**, and also have combinations of **AND** and **OR**.

Complex criteria can be generated in this way. It is advisable to save complex report criteria selections for future use. The **Define Filter** panel is updated to include the new clause, which is preceded with the word **OR**.

Further clauses can be added as required.



Deleting Clauses

Clauses associated with the current report can be deleted, if required.

For example, if the existing clauses state 'dietary needs includes gluten free and meal arrangements includes schools meals', you may wish to delete 'and meal arrangements includes schools meals'.

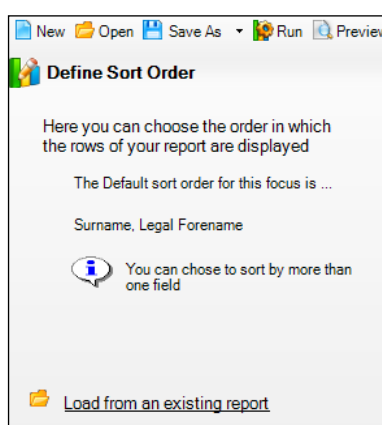
1. From the **Define Filter** panel, highlight the **Clause** to be deleted and click the **Delete** button.
2. To delete **ALL** clauses attached to the current report, highlight the **Focus** (which is followed by the word 'where'), e.g. Students where, and either press the **Delete** key or click the **Delete** button.
3. When you have set up the required report filters, click the **Next** button to display the **Define Sort Order** panel.

Defining the Report Sort Order

The **Define Sort Order** section of the **Report Designer** enables you to choose the order in which the rows of your report are displayed.

Each report design is automatically sorted with an appropriate default sort order, e.g. surname order for Student Focus reports, etc.

All reports have an appropriate default sort order (e.g. **Surname** order for a **Student** report), but it is possible to specify any sort order required. The sort order can contain multiple fields e.g. sort by Surname, Type of Need, then Date of Birth, etc.



The default sort order is shown in the **Define Sort Order** panel and is determined by the **Data Area** initially selected. However, you can choose one or more alternative fields to sort the rows, if required.

1. From the navigation tree, navigate to the field on which you wish to sort the report.
If the required field is not visible, expand and contract the tree by clicking the + and - buttons until the required field can be seen. Alternatively, double-click a field group name to expand the tree. The required field can also be found by entering the field name in the **Find** field. The tree expands to display the first field matching the field name entered.
2. Select the field by either clicking the **Right arrow** button or double-clicking the field name to select it. To remove a selected field, highlight it and click the **Left arrow** button.
3. Set the sort order priority by highlighting the field name in the **Sort fields** panel and then clicking the **Up** or **Down** arrow button.

You can sort the report on more than one field and choose the sort order priority according to the first field in the sort list, e.g. by **Surname**, then **Forename**, then **Date of Birth**, etc.

4. By default, fields are automatically sorted in ascending order. To sort in descending order, select the check box adjacent to the appropriate field.

NOTE: If you change the sort order priority, all sort fields affected default to ascending order and you need to reselect any fields that you wish to appear in descending order.

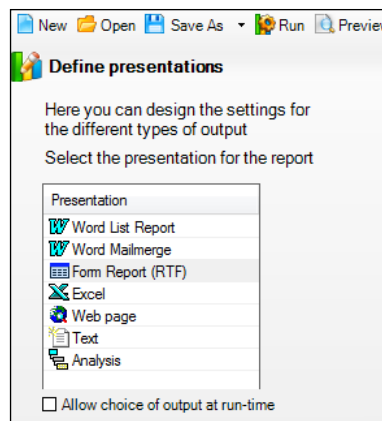
The sort order is saved with the report design.

5. Click the **Next** button to display the **Define Presentations** panel.

Selecting the Report Presentation

Once the report definition has been created, you need to set up the report outputs. You can provide the person running the report with a choice of output, or force the report to be generated with one specific output.

There are currently seven different types of report output, which can be set up according to your requirements.



In addition to saving complete report designs, it is also possible to save separate elements of the report design, i.e. save the report selection criteria independently, or the data required selection independently, or both.

Once saved, they can be used to design new reports without the need to reselect the information.

To force the report to be generated with one output, select the required output type from the **Define Presentations** panel, e.g. Excel, then deselect the **Allow choice of output at run-time** check box. The **Enter required settings for report output types** panel displays relevant fields for completion, depending on the output type selected.

Defining Word List Reports

Word List reports can be used when the report output presentation is required as a simple table.

Microsoft Word® Lists can be generated for reports that comfortably fit the width of a sheet of paper. The list is displayed in a table within a single Word document.

The layout/design of the report is determined by a previously defined Word template that contains relevant text, formatting and mail merge fields which are replaced with data from your database when the report is run. Default templates are provided, which can be edited, if required. These templates are stored in the Document Management Server.

1. Select **Word List Report** from the **Define Presentations** panel. The right-hand panel changes to accommodate the input of your Word List report settings.
2. Select the **Allow choice of output at run-time** check box (if required).
This enables the user to specify the settings when the report is run. If this check box is not selected, the report automatically opens in Excel according to the settings you define.
3. In the **Enter required settings for report output types** panel, enter a **Report Title**.
4. Select the **Suppress duplicates** check box, if required.

Enter required settings for report output types

Report Title

Suppress duplicates ☒

If you expect to see repeated rows on the report, ensure that this check box is not selected.

5. Select the required template type from the **Word List Report Settings** panel:
 - **Standard Portrait** - A simple list report is produced. Click the **Preview** button to view the result.
 - **Standard Landscape** - A simple list report is produced. Click the **Preview** button to view the result.
 - **User-defined Template** - If you wish to use Word with macro support for field names, ensure that the associated check box is selected.
 - **Allow this template selection to be made at run-time**, if required, by selecting the associated check box.

Word List Report Settings

Select a template to be used for this report:

☒ Standard Portrait

☐ Standard Landscape

☐ User-defined template

☐ Allow this template selection to be made at run-time

Use Word List reports when you want the report output presented as a simple table. Photo grids and special report fields are also available.

The standard templates are stored locally and can be edited to suit your requirements.

See the on-line help for full instructions.

6. If required, you can preview the report by clicking the **Preview** button on the main toolbar, run the report by clicking the **Run** button or save the report design by clicking the **Save As** button.

7. Click the **Next** button to continue.

Editing an Existing Word List Template

New templates can be created by basing them on existing templates. Once created, the template is associated with the current report and both are stored in the Document Management Server.

NOTE: This template is for the current report only and cannot be used in conjunction with any other report.

1. If a template is required to be used with more than one report it can be saved to a location of your choice by using the **Save As** option in Word.
2. Save the template and close down Word.
3. In the **Report Designer**, save the report design.

If additional changes are required, click the associated **Edit** button to reopen Word and edit as required.

Reusable Templates

There may be occasions when a template is appropriate to use with more than one report, for example where the school address and logo have been added.

1. To ensure a template is available for reuse, after editing the template and before closing Word, use the **Save As** option in Word to save the template to a location of your choice.
2. When the template is next required, click the **User-defined template** radio button (in the **Report Settings** pane) and navigate to where the template is saved.

Defining Word Mail Merge Reports

Word Mail Merge reports should be generated when you want the report to consist of one page per record, e.g. letters, forms, etc. This type of output is produced using Word's mail merge facility.

To set up Word Mail Merge reports, you must create and associate a mail merge document that contains the required mail merge fields and formatting. Click the **New** button to launch Word. The report fields are available in the form of buttons situated on a toolbar.

Once created, you must save the Word document and close Word immediately. This associates the mail merge document with the report design.

1. Select **Word Mailmerge** from the **Define Presentations** panel. The right-hand panel changes to accommodate the input of your Mail Merge report settings.
2. Select the **Allow choice of output at run-time** check box (if required). This enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened and based on the associated mail merge document.
3. In the **Enter required settings for report output types** panel, enter a **Report Title**.

4. Select the **Suppress duplicates** check box (if required).

Enter required settings for report output types

Report Title

Suppress duplicates ☒

If you expect to see repeated rows on the report, ensure that this check box is not selected.

There can only be one mail merge document associated with the report and you must therefore either create a new mail merge document or edit the existing mail merge document. SIMS looks for a Word template called `SIMSReportForm.dot` when creating this type of report. If this template is not found, SIMS uses the `Normal.dot` template. This results in a report being generated based on a blank document.

It is therefore recommended that you edit or create a template called `SIMSReportForm.dot` and store it in the `C:\PROGRAM FILES\SIMS\SIMS .net` folder.

Word Mailmerge Settings

Merge Document

To set up Word Mailmerge, you must create and associate a mailmerge document. Do this by clicking the New button which will launch Word. The report fields will be available on a toolbar button. In order to use existing label templates, use Open to select one.

Once you have edited it, you must save the Word document, close Word then save the report design immediately. This associates the mail merge document with the report design.

If you click the Delete button, the association will be broken. If you wish to revert back to the original mailmerge document, you must reload the report design.

5. Click the **New** button to create a new mail merge document (if required). A Microsoft Word template is opened, enabling you to enter text and mail merge fields. The document should be saved with the default name of `ReportMailmerge`. When complete, click the **Save** button and close Word. Alternatively, close Word without saving, then when prompted to save, click the **Yes** button.
6. If you want to use an existing label template, click the **Open** button and select the required template.
7. Click the **Edit** button to edit the existing mail merge document (if required).
8. Before progressing further, save the report design. This process associates the merged document with the report design.
9. To disassociate the merged document with the report design, click the **Delete** button.
10. If required, you can preview the report by clicking the **Preview** button or run the report by clicking the **Run** button.
11. Click the **Next** button to continue.



More Information:

Editing the Report Mail Merge Document on page 34

Deleting the Current Word Mail Merge Document on page 34

Editing the Report Mail Merge Document

1. From the **Word Mailmerge** settings panel, click the **Edit** button. Word is launched with the associated merge document displayed.
The report fields are available on a toolbar button.
2. Insert additional mail merge fields by clicking the **Insert Merge Field** button.
3. To insert further merge fields, position the cursor where you want to insert the merge field then click the **Insert Merge Field** button on the Word toolbar and select the required merge field, e.g. surname, forename, DOB, etc.

NOTE: The fields available are the same as the fields included in the report design. Each merge field is inserted with double chevrons (e.g. <<Surname>>) and is replaced with live data when the report is run.

4. Format the merge fields and the remainder of the merge document as required.
The options are:
 - **Add or remove merge fields.**
 - **Format merge fields** to change the appearance of the resulting report text, e.g. colour, bold, italics, etc. The fields can also be repositioned although this should be done with care to ensure the resulting report data fits on the page.
 - **Insert logos**, graphics and any other additional text.
 - **Change margins**, page formatting, etc.
5. Click the **Save** button on the Word toolbar then close down Word.
6. Switch back to SIMS and save the report design. The edited merge document is associated with the report design.

*NOTE: The association with this merge document is maintained unless you click the **Edit** button again or the **Delete** button. If either of these buttons are clicked, you need to reload the report design (without saving the current report design) to load the merge document template that was associated with the report at the time it was last saved.*

Deleting the Current Word Mail Merge Document

To break the association with the current mail merge document, click the **Delete** button.

You subsequently need to create another mail merge document before you can produce a Word Mail Merge report.

Defining Form Reports (RTF)

Form reports use standard Rich Text Format (RTF) which has the advantage that it can be read by any word-processor. This format provides more flexible control of the report. You can present the result as a simple table, or as a form report. Sub-tables and report inserts are also available.

On running the report, key fields in the selected template are replaced with the appropriate values from the report data. The RTF file is opened in whichever application you have associated with RTF files.

1. Select **Form Report (RTF)** from the **Define Presentations** panel. The right-hand panel changes to accommodate the input of your RTF report settings.
2. Select the **Allow choice of output at run-time** check box (if required).
This enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened in whichever application you have associated with RTF files.
3. In the **Enter required settings for report output types** panel, enter a **Report Title**.
4. Select the **Suppress duplicates check box** (if required).

Enter required settings for report output types

Report Title

Suppress duplicates ☒

If you expect to see repeated rows on the report, ensure that this check box is not selected.

5. In the Form Report (RTF) Settings panel, Select a Rich Text Format template to be used for this report.

Form Report (RTF) Settings

Select a Rich Text Format template to be used for this report:

☒ Standard Portrait ☐ Show Numeric dates

☐ Standard Landscape **03 Feb 2016**

☐ User-defined template

☒ When editing user-defined templates, use Word with macro support field names

☐ Allow selection of template to be made at run-time

☐ Use Border

Page breaks

The following fields have been selected to sort on. They are therefore available for page breaking. You may select one or many of these to break up the report.

☐ ChosenName
☐ role_text
☐ Photo Available

Use RTF output if you want more flexible control of the report. You can present the result as a simple table, or as a form report. Sub-tables and report inserts are also available.

The standard templates are stored locally and can be edited to suit your requirements.

See the on-line help for full instructions.

- **Standard Portrait** - A simple list report is produced. Click the **Preview** button to view the result.
- **Standard Landscape** - A simple list report is produced. Click the **Preview** button to view the result.
- **User Defined Template** - If you wish to use Word with macro support for field names, ensure that the associated check box is selected.
- **When editing user-defined templates, use Word with macro support field names** - Select this check box if appropriate.

- **Allow selection of template to be made at run-time**, (if required), by selecting the associated check box.
- 6. If required, you can preview the report by clicking the **Preview** button on the main toolbar, run the report by clicking the **Run** button or save the report design by clicking the **Save As** button.
Alternatively, specify **Page breaks** and/or **sub-tables** and **report inserts** by clicking in any of the selected sort field check boxes.
- 7. When you have finished specifying the settings for your report, click the **Next** button to continue.

**More Information:**

Specifying Page Breaks on page 36

Editing an Existing Form Report (RTF)

New templates can be created by basing them on existing templates. Once created, the template is associated with the report you are designing and is also available for use with other templates.

1. From the **Report Settings** panel, select the **User-defined template** radio button. Confirm that you want to use a blank template.
2. If you select **Yes**, the blank template, file name `Blank.rtfTemplate`, opens in the word processor you have associated with Rich Text Formats.

Alternatively, select **No** to display the Select a base template on which to base your use-defined template dialog from where you can select the template of your choice. Highlight the appropriate template name:

- `StandardPortrait.rtfTemplate`
- `StandardLandscape.rtfTemplate`
- or a previously created RTF template.

Click the **Open** button to display the template in the word processor you have associated with Rich Text Formats.

3. Edit the template as required by entering numerous fields to achieve various results.

Specifying Page Breaks

Previously, when running a **Standard Portrait** or **Standard Landscape** report in Form Report (RTF) mode, a simple columnar list was produced. Depending on the 'sort fields' selected when defining your report, the system now identifies these as possible areas for page break separation, e.g. a page break can be inserted after each Surname, Forename.

It is worth bearing in mind that if **Surname** is chosen as the 'sort field' i.e. wherever the key value of the sort field changes, a page break is inserted, all students with the surname of Smith (for example) are displayed on one page.

To prevent this occurring, it is possible to use a combination of the Page break 'sort fields' so that only students with the same Surname and Forename appear on the same page.

The ability to specify when page breaks are inserted is only available when designing reports as Word Form Reports (RTF) and when using the **Standard Portrait** and **Standard Landscape** options, not when using user defined templates.

Specify required **Page breaks** and/or **sub-tables** and **report inserts** by clicking in any of the selected sort field check boxes that are displayed in the **Form Report (RTF) Settings** panel.

Specifying Sub Tables and Report Inserts

Sometimes, there may be a requirement to create complex predefined reports that contain subsets of data. It is possible to define a <REPORT INSERT> tag that can be included in the user-defined template along with the sub report name i.e. <REPORT INSERT ContactsSubReport>. An unlimited number of sub reports can be inserted into a main report in this way.

Key Fields

On running the report, SIMS replaces any key fields it finds in the template with the appropriate values from the report.

System Key Fields

Report title: <REPORT TITLE>

Date report produced: <REPORT DATE>

Time report produced: <REPORT TIME>

User who produced the report: <REPORT USER>

Selection filter used in the report: <REPORT FILTER>

Number of records in the report: <RECORD COUNT>

Formatting Dates

It is possible to add a formatting string for a date.

Format	Definition	Example
d	date	1
dd	date	01
ddd	day	Mon
dddd	day	Monday
M	month	1
MM	month	01
MMM	month	Jan
MMMM	month	January
yy	year	16
yyyy	year	2016

For example, Student <STUDENT> <DOB dd-MM-yy> would display Ben Abbott 27-05-06.

Report Key Fields

To include any field from the report, simply type the Column title you have designed for the field and put it inside angle brackets. The name and the case must match, otherwise it is not translated. It does not matter if there are fields in the report that are not included in the template because it is possible to re-use fields multiple times.

This is similar to mail merge, except that the list of fields is not available. This is because we are not making any direct link between SIMS and the application used to read the RTF files. Instead, the list of fields is copied to the clipboard when creating a new RTF template, so you can paste it into your document for reference.

The Report Key Fields are case-sensitive, so they must be the same as those defined in the report. Otherwise, key fields are not translated.

Personal Pronouns Fields

The following can be used to deal correctly with male/female variations but the **Gender** field must be included in the report or they are not translated:

<he/she>

<his/her>

<him/her>

<his/hers>

Photo Fields

Photo fields can be sized by a percentage:

<Photo (50%)>

Logical Fields

Logical fields by default return True or False, but these can be replaced with other alternatives:

<Active (active/inactive)>

Dates

If you do not wish to repeat the whole document for each record, specify the start and end of the portion of the document that repeats for each record in the report using <RECORD START> and <RECORD END>.

If <RECORD START> is not present, the beginning of the document is assumed. If <RECORD END> is not present, the end of the document is assumed and a page break is then used to separate each record.

Care should be taken not to include unwanted paragraph marks.

If your report includes a related multiple recordset, such as a list of the classes for each student, you can display this information in a table.

You must add a table to the template and put the report key fields in the appropriate columns. When SIMS finds the related fields it knows to repeat the row for each class.

In addition, an entire report can be inserted, provided that it has been defined with a RTF template.

The inserted report must be for the same Focus (e.g. Student) and SIMS ignores the selection filter defined for the insert report and execute it for the current focus. The resulting Rich Text is inserted into the final report.

To include a report insert at a given point, use the key <REPORT INSERT [report name]> where [report name] is the name of the report you wish to insert. If the report cannot be found or is not a Rich Text report, an error message occurs.

NOTE: Report Inserts are necessarily slow, as each inserted report has to be executed once for every item in the main report.

Using RTF to produce simple List Reports

RTF has recently been extended to produce simple list reports; instead of specifying where individual fields go in the template, a table of the complete dataset can be produced simply by including the tag <REPORT TABLE>.

Thus a blank page with this tag at the top is sufficient to produce a full report. The other system tags are also available, but individual field tags are ignored if the <REPORT TABLE> tag is found.

The system tries to size the columns according to the maximum width of the text, but it may end up too wide for the page, in which case a form report needs to be designed with fixed column widths.

Grouping data

If you precede your <REPORT TABLE> with a <GROUP BY column_name> tag, the system excludes that column from the table and instead it produces a table for each different value of the group by field.

NOTE: The dataset needs to be ordered by this field, to prevent the report using numerous pages.

1. Save the template and close the word processor.
2. Switch back to SIMS Reporting and save the report design.

The modified template is saved with the report design but does not affect any other reports that use the original template. All templates are stored in the Document Management Server.

If additional changes are required, click the associated **Edit** button to re-open the word processor and edit as required.

Defining Excel Reports

1. Select **Excel** from the **Define Presentations** panel. The right-hand panel changes to accommodate the input of your Excel report settings.
2. Select the **Allow choice of output at run-time** check box (if required).
This enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened in Excel according to the settings defined.
3. Enter a title for the report in the **Report Title** field.

4. Select the **Suppress duplicates** check box (if required).

Enter required settings for report output types

Report Title

Suppress duplicates ☒

If you expect to see repeated rows on the report, ensure that this check box is not selected.

5. From the **Excel Settings** panel, select the **Use the following settings to control Excel's presentation** check box (if required).
 - **Standard Portrait/Standard Landscape**
Select the appropriate radio button.
 - **Report Template**
Select this option and browse to the location of a stored report template.
 - **Divider Frequency**
Defines the number of records/rows to be grouped and separated by a horizontal line.
 - **Number of Fixed Columns**
Specifies the number of columns repeated on printed continuation pages if there is insufficient room to fit all columns onto a single page.
 - **Go straight to Print Preview**
Select this check box if you want the report to open in Excel's print preview mode.
 - **Group into Separate Sheets**
Select this check box if you want the data in the report to be listed in groups. Where a report has been appropriately designed, it is possible to separate an Excel report into groups of data, with each group displayed on a separate worksheet.
 - **Record Count**
Select this check box to insert the number of records in the top left-hand side of the report, preceded by the text entered in the adjacent field (defaults to **Records**).

Excel Settings

☒ Standard Portrait
☐ Standard Landscape
☐ Report Template

☒ Allow these settings to be changed at run-time

Divider Frequency:
 Number of Fixed Columns:

☒ Go straight to Print Preview
☐ Group into separate sheets
☒ Record count:

Without ticking the box to use these settings, the report will go straight to Excel. You may need to untick the Suppress Duplicates box if you expect to see repeated rows.

6. Select the **Allow these setting to be changed at run-time** check box (if required).

This option enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened in Internet Explorer and saved with the file name specified.

7. If required, preview the report by clicking the **Preview** button, run the report by clicking the **Run** button or save the report design by clicking the **Save As** button.
8. Click the **Next** button to continue.

Setting up a Group of List Reports for Excel

It is possible to design an Excel report so that it is split into groups that are presented in separate worksheets within the Excel Spreadsheet. For example, a list report that includes all pupil/students in Registration Groups 8A, 8B and 8C can be separated into three lists, one for each Registration Group. Each list (e.g. Registration Group) would be displayed on a separate worksheet within the Excel report.

Ensure that the following form part of the report design:

- The field to be separated must be included in the sort order. Using the previous example, this would be Reg Group. This field must be the first field in the sort order, although other sort fields can be included.
- The field to be separated/grouped must be the last field in the **Select Data Fields** section of the Report Designer and therefore, the last column in the report. The field does not actually appear as a column in the report, but is used as the title.
- The **Group into Separate Sheets** check box must be selected in the **Excel Output** settings.

Defining Web Page Reports

HTML web page reports are presented in tabular format directly in your Internet Browser.

1. Select **Web page** from the **Define Presentation** panel. The right-hand panel changes to accommodate the input of your Web page report settings.
2. Select the **Allow choice of output at run-time** check box (if required). This enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened in Excel according to the settings you define.
3. In the **Enter required settings for report output types** panel, enter a **Report Title**.



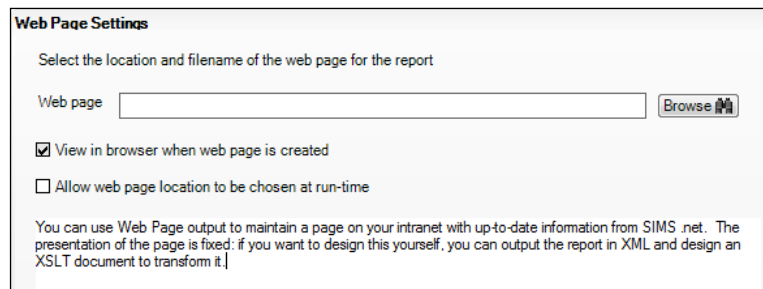
Enter required settings for report output types

Report Title

Suppress duplicates ☒

4. Select the **Suppress duplicates** check box (if required).

If you expect to see repeated rows on the report, ensure that this check box is not selected.



Web Page Settings

Select the location and filename of the web page for the report

Web page

☒ View in browser when web page is created

☐ Allow web page location to be chosen at run-time

You can use Web Page output to maintain a page on your intranet with up-to-date information from SIMS .net. The presentation of the page is fixed: if you want to design this yourself, you can output the report in XML and design an XSLT document to transform it.

5. Enter a file name for the report in the **Web page** field or click the **Browse** button to navigate to the location of an existing file.
6. Select the **View in browser when web page is created** check box (if required). This enables you to view the report immediately after the web page design is complete.
7. Select the **Allow web page location to be chosen at run-time** check box (if required). This option enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened in your default web browser and saved with the file name specified.
If required, you can preview the report by clicking the **Preview** button, run the report by clicking the **Run** button or save the report design by clicking the **Save As** button.
8. Click the **Next** button to continue.

Defining Text File Reports

1. Select **Text File** from the **Define Presentations** panel. The right-hand panel changes to accommodate the input of your **Text File** report settings.
2. Select the **Allow choice of output at run-time** check box (if required).
This enables the user to specify the settings when the report is run. If this check box is not selected, the report is automatically opened in Excel according to the settings you define.
3. In the **Enter required settings for report output types** panel, enter a **Report Title**.



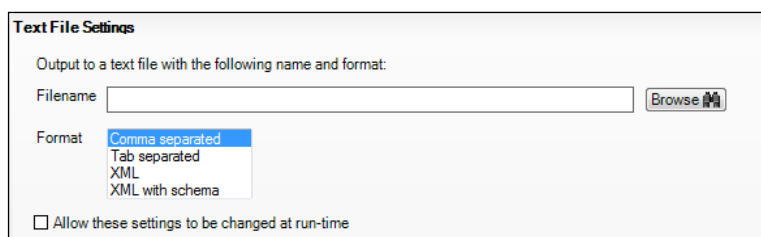
Enter required settings for report output types

Report Title

Suppress duplicates ☒

4. Select the **Suppress duplicates** check box (if required).

If you expect to see repeated rows on the report, ensure that this check box is not selected.



The image shows a 'Text File Settings' dialog box. It contains a label 'Output to a text file with the following name and format:' followed by a 'Filename' text field and a 'Browse' button with a folder icon. Below this is a 'Format' dropdown menu with four options: 'Comma separated' (highlighted), 'Tab separated', 'XML', and 'XML with schema'. At the bottom, there is a checkbox labeled 'Allow these settings to be changed at run-time' which is currently unchecked.

5. Enter a file name for the report in the **File Name** field or click the **Browse** button to navigate to the location of an existing file.
6. Select the required text file **Format** type from the following options:
 - **Comma Separated** – each value is separated by a comma.
 - **Tab Separated** – each value is separated by a tab.
 - **XML no schema** – each value is XML tagged. The tag definition is not included.
 - **XML with schema** – each value is XML tagged. The tag definition is included.
7. Select the **Allow these settings to be changed at run-time** check box (if required).
This option enables the user to specify the settings when the report is run. If this check box is not selected, the report is opened automatically in Internet Explorer and saved with the file name specified.
8. If required, you can preview the report by clicking the **Preview** button, run the report by clicking the **Run** button or save the report design by clicking the **Save As** button.
9. Click the **Next** button to continue.

Editing an Existing Report Design

The reports available depend on the permissions assigned to you.

1. Select **Reports | Design Report** to display the **Report Designer**.
2. Click **Open an existing report** to display the **Open Report** dialog.
3. From the navigation tree, select the folder in which the required report is stored. All reports held in the folder are displayed in the right-hand panel.
The navigation tree is similar to Windows® Explorer. Click +/- to expand/contract the tree.
4. Clicking the **View** button and selecting **Detail**, **List** or **Icons** changes the screen display.
5. Highlight the required report and click the **OK** button.

Saving Report Designs

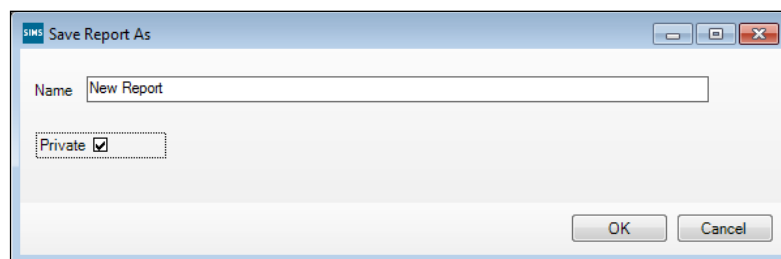
Saved reports are stored by default in the **Document Management Server**.

They are only available for viewing and editing by you, unless they are made Public (available to other users with appropriate permissions) at the point of saving.

Alternatively, you can make existing reports Public by copying them to the appropriate Public folder, e.g. *Focus* or *Category*.

1. Click the **Save As** button on the Report Designer toolbar to display the **Save Report as** dialog.

Alternatively, click **Save my report** in the **Report Complete** panel.



2. Enter a **Name** for the report. This can be up to 40 alphanumeric characters (including symbols).

If you wish to make the report Public (available to others with appropriate permissions), deselect the **Private** check box.

This automatically stores a copy of the report in the appropriate *Focus* folder which can then be accessed by users with appropriate permissions.

If you choose not to do this now, you can subsequently make a report public by copying it to the *Focus* folder or the appropriate *Category* folder.

3. Click the **OK** button to save the report to the Document Management Server.
4. To overwrite the saved report, click the **Save** button.

NOTE: Check that the Report Categories are marked as active if you wish them to be visible.

Report Criteria Conditions

When designing reports it is possible to define various criteria to restrict the data returned in the resulting report. Various Conditions are used, such as equals, does not equal, etc. The Conditions available depend on which type of field is selected.

These are as follows:

After

Returns records where the date is after the date you select.

Before

Returns records where the date is before the date you select.

Begins

Returns records where the letters entered appear at the beginning of the field, e.g. Surname Begins 'Ha' would return Haley, Hall, Hawkins, etc.

Between

Returns records where the date falls between the range you select in the Value 1 and Value 2 fields, e.g. Date of Birth Between '01 January 1999 and '01 January 2000'.

Contains

Returns records where the specified field contains any of the letters entered as long as they are consecutive, e.g. Address – Town Contains 'BE' returns Bedford, Belper, Aberdeen, etc.

Equals

Returns records that match the specific value that you enter or select. For text fields, the search is not case sensitive.

Greater than

Returns records where the field value is greater than the number you provide.

Less than

Returns records where the field value is less than the number you provide.

Is one of/includes (as applicable)

Returns records where the field value matches any of the list values you select.

Choose the values by selecting the check boxes adjacent to the value names.

Is not one of/does not include (as applicable)

Returns records where the field value does not match the list values you select.

Choose the values by selecting the check boxes adjacent to the value names.

Is True or False

Returns records that match the condition you choose – either True or False, e.g. Birth Certificate Seen is 'True'.

Sounds Like

Returns records where matches sounds like the value entered, noting that the first letter is ignored, e.g. Forename sounds like 'Tommi' returns Tommy, Ethnicity sounds like 'Bangladesh' returns Bangladesh and Bangladeshi.

04 / Defining and Running Analysis Reports

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Introduction

In addition to the Word, RTF, Excel, Web and Text File report outputs, it is also possible to use the data generated by a report for further analysis within SIMS. This is achieved by presenting a tabular display of the report data in an Analysis window. The content of this table is defined by the report design, i.e. what is displayed in the rows and columns.

By default, the analysis table displays a count of the values found in the report data, e.g. the number of pupil/students in each Registration Group who have school meals, the number of pupil/students who have a nut free dietary requirement, etc.

NOTE: There are currently no settings required for Analysis reports.

Opening Existing Reports

1. Select **Reports | Design Report** and click the **Open** button on the toolbar or select **Open an existing report** from the **Report Designer** window.
2. Use the navigation tree to locate the folder in which the required report is stored. All reports in the selected folder are displayed in the right-hand panel.
3. Highlight the required report name and click the **OK** button.

The elements of the selected report populate the appropriate areas of the Report Designer and can be edited (with the exception of the Focus) to suit the report you are designing.

Defining Analysis Reports

Choosing the Records to include in the Analysis Table

As with all reports, you need to determine which records should be included in the report. For example, if you are producing a Student Focus report, you may wish to restrict the report to the pupil/students within a specific year. This is achieved using report filters. If no report filters are applied, then all the records within the Focus of the report are analysed.



More Information:

Applying Report Filters on page 24

Choosing the Additional Information that can be Displayed

The first column of the report design determines what additional information can be viewed when you right-click a cell in the analysis table. It is therefore important that this column is informative, e.g. for a Student Focus report, use Full Name or Full Name and Reg Group.



More Information:

Selecting the Data Area (Report Rows) on page 19

Choosing the Rows and Columns

You need to determine what should be displayed in the rows and columns of the analysis table.

For example, you may wish to produce an analysis table that lists all the pupil/students in Years 8 and 9, by Registration Group, who have a specific dietary need.

The second column in the report design must be the field that is listed in rows and the third column in the report design must be the field that is listed in columns in the analysis table. Using the previous example, the rows can be Dietary Needs and columns Reg Groups, although these can be reversed if required. It is often best to choose the field with the narrowest content to be columns. In our example, Registration Group would be better as columns.

The screenshot shows the SIMS Analysis window with a table of dietary needs. The table has 7 columns: Dietary_needs, 10A, 10B, 10C, 10D, 10E, and 10F. The rows list various dietary needs and their counts for each registration group.

	10A	10B	10C	10D	10E	10F
Artificial colouring allergy	1	1	0	1	0	0
Artificial colouring allergy, Halal	0	0	0	1	0	0
Artificial colouring allergy, No dairy produce	0	0	1	0	0	0
Gluten free	0	0	0	2	1	0
Gluten free, Halal	0	1	0	0	0	0
Gluten free, No nuts of any type/quantity	0	0	0	0	1	0
Halal	0	1	0	0	0	0
Kosher foods only	0	1	1	1	0	1
Kosher foods only, Halal	0	0	0	0	0	1
Kosher foods only, Vegetarian	0	1	0	0	0	0
No dairy produce	0	1	0	0	0	1
No dairy produce, Kosher foods only	0	1	0	0	0	0
No nuts of any type/quantity	0	3	0	1	0	0
No nuts of any type/quantity, Seafood allergy	0	0	0	0	0	0
No pork	0	0	1	0	0	1

Below the table, there are controls for Shading, Row (Dietary_needs), Column (Reg), Calculate (Total), Formula (Count), Decimals (0), and buttons for Copy to Excel, Edit Score Tables, and Close.

Further columns can be included in the report design to enable you to alter what is displayed in the rows and columns when the analysis table is generated. If you also want to know what meal types each pupil/student has, or you want to break the analysis down by gender, you would need to include these two fields in the report design.

NOTE: If you change the sort order priority, all sort fields affected default to ascending order and you need to reselect any fields that you wish to appear in descending order.



More Information:

Selecting the Data Fields (Report Columns) on page 20

Running an Analysis Report

Once the analysis table has been produced, the following options are available:

- Each cell can be shaded according to its value – the higher the number, the darker the shading.
- The width of the columns can be changed on an individual basis, or collectively.
- Where required, the Analysis window can be maximised to full screen to display the optimum number of rows and columns.
- The fields listed in the rows and columns can be changed to alter what is being analysed. The fields available depend on how the report was designed. For example, the previously displayed analysis table could be changed to show the number of male and female pupil/students of each dietary need.
- The type of value displayed in each cell can be altered. By default, totals are displayed, but this can be changed to percentages or averages.
- The number of decimal places in the display can be changed to a maximum of four.
- Data displayed can be copied and automatically presented in Excel for further manipulation/editing as required.
- Formula can be applied to further analyse the data. By default, values are counted. Scores can be assigned to values in the analysis table in order to provide a score-based analysis. This can be useful for analysing gender balance for example.

NOTE: In order to maximise what can be analysed, careful consideration must be given to the report design (please see Defining Analysis Reports on page 47).

You may prefer to preview the report to check the content before proceeding.

1. Open the required report in **Run** mode.
If the **Allow choice of output at runtime** option was selected when creating the report design, you are required to select the output type before the report can be run.
2. Select **Analysis** from the drop-down list adjacent to the **Run** button.
3. Click the **Run** button.
4. The report is generated and the **Analysis** window is displayed. You can change the way the data is displayed with several screen controls available that enable you to adjust the display.

**More Information:**

Using Scores and Formulae on page 51

Shading Analysis Report Data

1. Move the **Shading** slide bar to the right to increase the colour depth and aid the visual impact of the data.
2. The larger the data value, the darker the shading becomes. Cells that contain a zero value remain grey. On exiting the **Analysis** dialog, the shading resets to the default of pale grey in all cells.

The screenshot shows the 'SIMS Analysis' window. It contains a table with dietary needs as rows and categories (10A-10F) as columns. The cells are shaded based on their values, with darker shades representing higher values. Below the table are controls for Shading, Col width, Row, Column, Calculate, Decimals, Formula, and buttons for Copy to Excel, Edit Score Tables, and Close.

	10A	10B	10C	10D	10E	10F	10G
Artificial colouring allergy	1	1	0	1	0	0	0
Artificial colouring allergy, Halal	0	0	0	1	0	0	0
Artificial colouring allergy, No dairy produce	0	0	1	0	0	0	0
Gluten free	0	0	0	2	1	0	0
Gluten free, Halal	0	1	0	0	0	0	0
Gluten free, No nuts of any type/quantity	0	0	0	0	1	0	0
Halal	0	1	0	0	0	0	0
Halal, Kosher foods only	0	0	0	0	0	1	0
Kosher foods only	0	1	1	1	0	1	0
Kosher foods only, No dairy produce	0	1	0	0	0	0	0
Kosher foods only, Vegetarian	0	1	0	0	0	0	0
No dairy produce	0	1	0	0	0	1	0
No nuts of any type/quantity	0	3	0	1	0	0	0
No nuts of any type/quantity, Seafood allergy	0	0	0	0	0	0	0
No pork	0	0	1	0	0	1	0

Changing Column Widths

1. Move the **Col width** slide bar to the right to increase the column width. This enables the full column title to be seen at the top of each column and enables large data fields to be accommodated clearly.
2. You can also size columns individually by positioning the cursor over a column border until the cursor changes to a double-headed arrow. Drag the border until the column is the required width.

Specifying the Number of Decimal Places

Data can be shown as whole figures or with up to four decimal places, if necessary. Select the required number of decimal places from the **Decimals** drop-down list.

Changing the Data Displayed in the Rows and Columns

By default, the second and third fields/columns from the report design become the rows and columns of the analysis table. Once the analysis window is displayed, it is possible to change the data displayed in both the rows and columns as required.

To change the selection of data displayed in the analysis table, select the required field from the **Row** or **Column** drop-down lists. These lists are populated with the field/column names included in the original report design.

Using Scores and Formulae

Scores are values that can be given to any set of data items and are used to perform calculations. By default, all items have a score of 1, but they can be assigned different values by clicking the **Edit Score Tables** button and entering the required value.

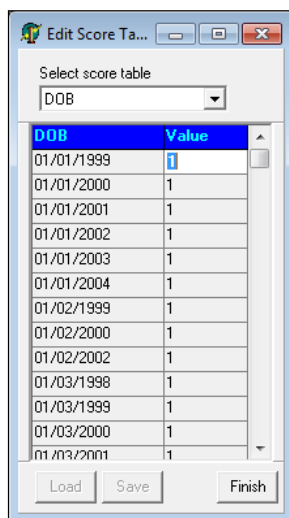
An example use of scores is the examination of gender balance within groups. To achieve this, a value of 1 could be assigned to the F gender while M is assigned the value of -1.

1. Select the **Edit Score Tables** button to display the **Edit Score Tables** dialog.

The dialog displays the current row definition and values. However, to define score values for another row definition, select the required values from the **Select Score Table** drop-down list.

2. Click into each value box in turn and edit the values as required.
3. Click the **Finish** button to save your selection.

Once the score values have been defined, they can be used in the analysis table by entering the name of the data type followed by the word **Score** in the lower **Formula** field, e.g. GenderScore.



Defining Scores and Formulae

1. Select the **Edit Score Tables** button to display the **Edit Score Tables** dialog.

The dialog displays the current row definition and values. However, to define score values for another row definition, select the required values from the **Select Score Table** drop-down list.

2. Click into each value box in turn and edit the values as required.
3. Click the **Finish** button to save your selection.

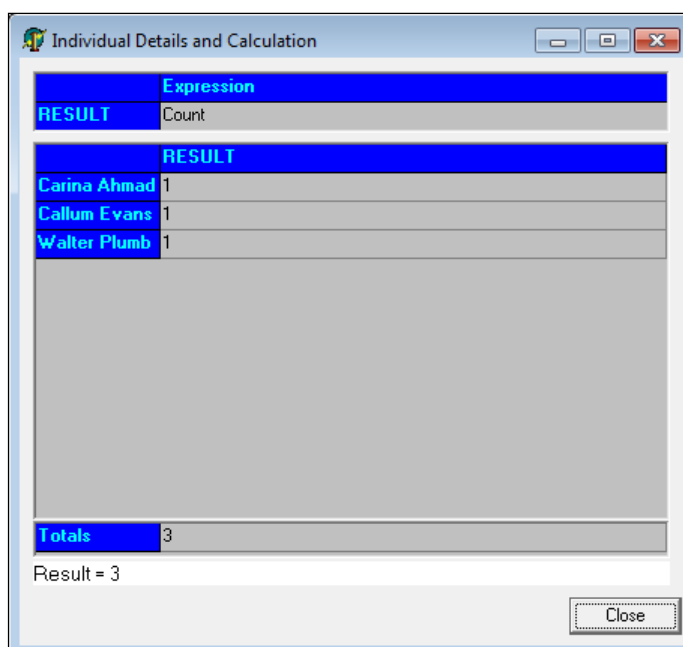
- Once the score values have been defined, they can be used in the analysis table by entering the name of the data type followed by the word **Score** in the lower **Formula** field, e.g. GenderScore.

Hiding and Showing Rows and Columns

- Click the particular row or column heading and select **Hide this Row/Column** from the pop-up menu.
- To reveal a hidden row or column, right-click anywhere within the row or column headings and select **Show Hidden Rows/Columns** from the pop-up menu.
- To invert a row or column, right-click the particular row or column heading and select **Invert Selection** from the pop-up menu.
- It is also possible to select multiple rows or columns to be hidden. This is achieved by right-clicking the space above a column heading or to the left of row heading.
- The selected rows/columns are highlighted in turquoise. You can then right-click and select **Hide Selected Columns** from the pop-up menu.

Displaying Additional Information

By clicking into a cell containing a data value, it is possible to display the **Individual Details and Calculations** dialog.



This dialog displays the details according to the first field/column in the report design. For instance, if Year Group was selected, the dialog shows which year group makes up the value in the cell.

Merging Rows and Columns

It is possible to merge two or more rows together to combine the analysis data. For example, you may wish to combine the values in the School Meals and Sandwiches rows to see the number of pupil/students in each Registration Group who stay at school during lunch time.

1. Drag the row heading onto the row to be merged.
2. The contents of the headings are merged and the values totalled. Columns can be merged in the same way.
3. To unmerge a row or column, right-click the merged row/column and select **Unmerge this Row/Column** from the pop-up menu.
4. It is also possible to select multiple rows or columns to be merged. This is achieved by right-clicking the space above a column heading or to the left of a row heading. The selected rows/columns are highlighted in turquoise. You can then right-click and select **Merge Selected Columns** from the pop-up menu.

Changing the Calculation Method

There are various methods available to change the way the analysis data is calculated. Once an analysis report has been created, the **Calculate** method can be changed at any time to give a different interpretation of the returned data.

- To display the total value for both the rows and columns, select **Total** from the **Calculate** drop-down list.
- To display the mean value for both the rows and columns, select **Average** from the **Calculate** drop-down list.
- To display the percentage value for both the rows and columns, select **% Population** from the **Calculate** drop-down list.

Copying an Analysis Report to Excel

This facility enables you to transfer the analysis report that has been created straight into Excel.

Click the **Copy to Excel** button to launch Excel and copy the entire report into an Excel spreadsheet.

The report title, the row and column definitions and the method used to calculate the values are all copied.



More Information:

Defining Word List Reports on page 30

Editing an Existing Word List Template on page 32

05/ Running Reports with an Effective Date

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Introduction

The facility to specify the Effective Date has been provided, primarily for the following reports:

- Registration Group Report (Dated)
- Registration Group Report (Dated with Columns)
- Registration Group Report (Dated DOB sort)
- Registration Group Report (Dated Gender Sort).

Running Reports with an Effective Date

When selecting any of the four Registration Group reports, you can specify an **Effective Date** when the other **Run Time Parameters** are specified.

The screenshot shows a dialog box titled "Enter parameter values for report" with a SIMS logo. It contains three main sections for selecting report parameters:

- Student Status is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "On Roll", "Leaver", "Pre-admission", and "Leaver (Deceased)". There is also an "Accept All (bypass filter condition)" checkbox.
- Year group is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "Year 7", "Year 8", "Year 9", "Year 10", and "Year 11". There is also an "Accept All (bypass filter condition)" checkbox.
- Reg group is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "10A", "10B", "10C", "10D", and "10E". There is also an "Accept All (bypass filter condition)" checkbox.

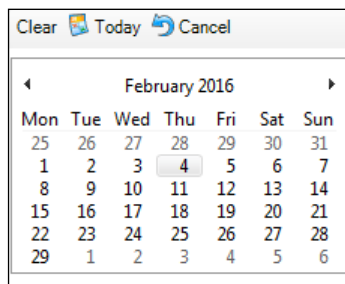
At the bottom right of the dialog are "OK" and "Cancel" buttons.

*NOTE: The default option is to **Bypass effective date (Use Today)**. This check box is always selected until you specify otherwise. To **Supply Effective Date**, you must ensure that you deselect this check box before the **Calendar** button becomes active.*

Specifying the Effective Date

The **Calendar** date defaults to today's date unless otherwise specified. It can be changed as follows:

- Click the **Calendar** button to display the current month with today's date highlighted.
- Click the **Forward** or **Back** arrows to change the month as required, then click the specific date. Alternatively, click the month displayed to select a different month from the drop-down list.
- Click the **Year** to display up and down arrows, enabling you to move between other years as necessary.



The date you have selected now appears in the relevant date fields.

Entering Parameter Values

Specify the **Year Group(s)** that you want to report on by selecting the relevant check boxes. Alternatively, click the **Select All** button to report on all the Year Groups in your school.

If you make a mistake, click the **Clear All** button and begin your selections again.

Enter parameter values for report

Supply Effective date: 04/02/2016

☒ Bypass effective date (Use Today)

Select Year Group(s):

- ☒ Year 7
- ☐ Year 8
- ☐ Year 9
- ☐ Year 10
- ☐ Year 11

☐ Accept All (bypass filter condition)

Select Registration Group(s):

- ☒ 7A
- ☒ 7B
- ☒ 7C
- ☒ 7D
- ☒ 7E

☐ Accept All (bypass filter condition)

OK Cancel

Specify the **Registration Group(s)** that you want to report on by selecting the relevant check boxes. Alternatively, click the **Select All** button to report on all the Registration Groups in your school. If you make a mistake, click the **Clear All** button and begin your selections again.

Click the **OK** button to compile the report.

NOTE: If the other run-time parameter values are date sensitive, e.g. the Pastoral Structure has been changed and the Registration Group(s) names are different from last year, the list of values available for selection is updated to reflect this each time the Effective Date is changed.

Designing Reports with an Effective Date

When designing reports that feature **Students** as the primary focus of the **Data Area**, you can specify an **Effective Date** before run-time. Reports that feature **Groups** as the primary focus of the **Data Area** is also presented with the option to specify an **Effective Date** before run-time.

In this case, the data displayed reflects the membership of the group on the date specified.

Specify effective date

Your report is capable of being run at an effective date other than today. If you wish to supply an effective date other than today please indicate your choice here

☒ Use Effective Date: 04/02/2016

☐ Supply Effective Date at run time

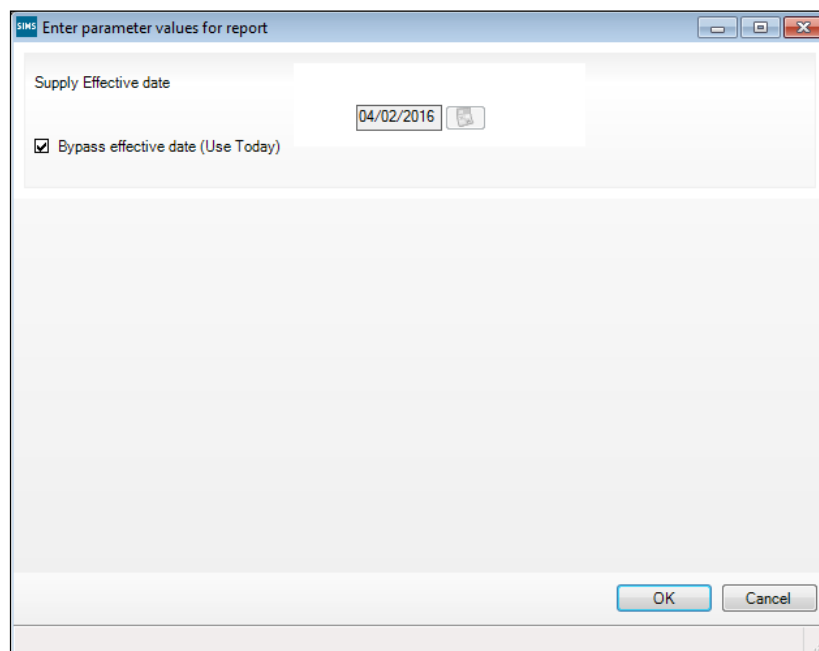
If any other reports that you design can be used with an **Effective Date**, the system detects this and offers you the option of specifying one. Reports that are created using an **Effective Date** should not take any longer to compile than reports without an **Effective Date**.

Select the **Use Effective Date** check box to activate the **Calendar** button and specify the date you require. Alternatively, select the **Supply Effective Date** at run-time check box and continue designing your report until you have decided which date to base the report on.

If you select this check box, the **Enter Parameter values for report** dialog is displayed.

You may decide at run-time that you do not want to specify an **Effective Date**.

If this is the case, select the **Bypass effective date (Use Today)** check box before clicking the **OK** button to compile the report.



The screenshot shows a dialog box titled "Enter parameter values for report" with a "SIMS" icon in the title bar. The dialog contains a section labeled "Supply Effective date" which includes a date input field displaying "04/02/2016" and a small calendar icon. Below this section is a checkbox labeled "Bypass effective date (Use Today)" which is currently checked. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

The **Effective Date** can also be accessed from the **Report Summary** at the bottom of the **Report Design** page prior to printing or previewing your report. Click the **effective on:** hyperlink to return to the **Specify Effective Date** panel and select the required date.

Report Summary

Report Name:

[effective on:](#) 04/02/2016

- [Data area:](#) [Student](#) - Population: On roll
- [Data Fields:](#) Forename & Surname, Age (ym), Gender, Photo
- [Filter Students](#)
- [Sort Order](#) Surname, Legal Forename
- [Default Output:](#) Word List Report
Duplicates suppressed in complex reports

Report Title:

Select the report output and continue as usual with printing or previewing your report.

06/Predefined Reports

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Introduction

A large selection of comprehensive predefined reports has been provided for use with this release of Reporting. These have been designed to minimise time spent on administration within the school and to enable users who have no need to design their own specific reports, to access varied and useful information.

Before creating or running a report designed by another user, it is a good idea to import the selection of predefined reports that have been provided for use with this version of the Reporting tool. This gives you an idea of the reports that are already available and the data fields that they contain and should make designing your own reports far easier for first time users.

Where appropriate, you are given the option to import any documents associated with the report. These include Word templates and merged documents that define the design of the resulting report. Once imported, these templates are stored, along with the actual report, on the Document Management Server. You can elect not to import these templates/merge documents, but you must ensure that a suitable alternative template and/or merge document is available in order to ensure the report is produced correctly.

Predefined report catalogues are available for download from the My Account website (<https://myaccount.capita-cs.co.uk>). Search for REPCAT.

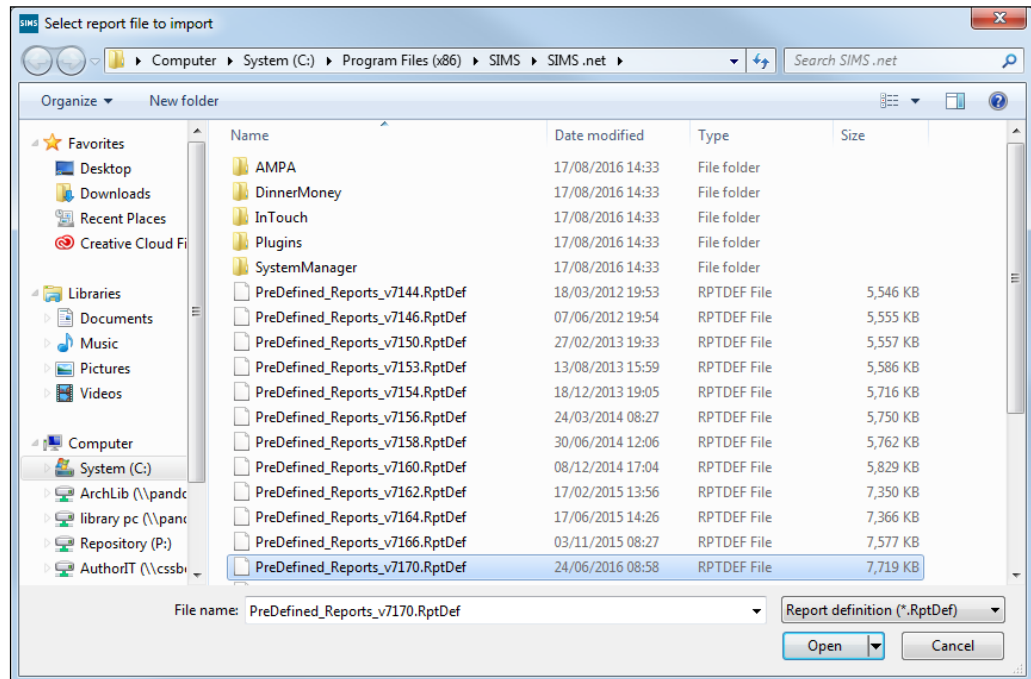
The catalogues list all the predefined reports that are currently available together with the location, description, run-time parameters, sort order and output type for each report. There is also a sample of each predefined report that we provide. The catalogues are updated as reports are added, amended or removed.

Label Generation

In this release of Reporting, a number of label templates have been included with the predefined reports. These can be imported in exactly the same way as the other predefined reports, if required.

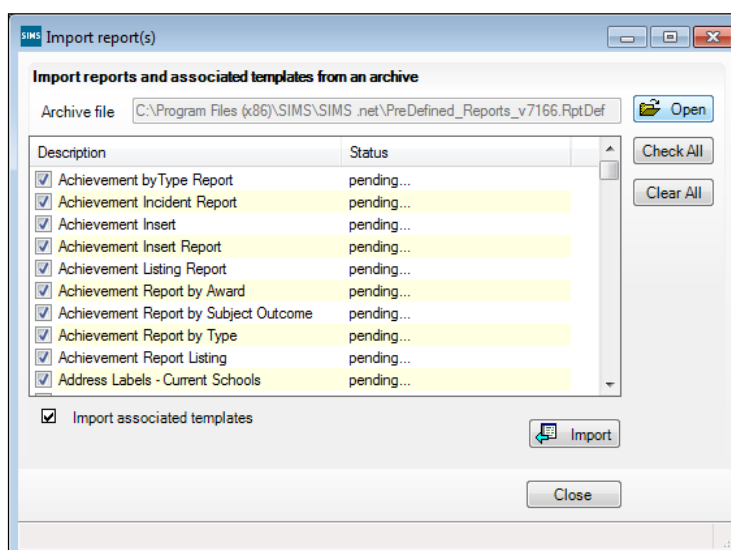
Importing Predefined Reports

1. Select **Reports | Import** to display the **Import reports and associated templates from an archive** dialog. Alternatively, if you are using the Report Designer (**Reports | Design Report**), select the **Import a report** option from the Welcome screen.



2. Locate the predefined report(s) by navigating to their stored location. The folder containing these predefined reports can usually be found in the C:\Program Files\SIMS\SIMS .net folder and is named according to the latest version of SIMS, e.g. PreDefined_Reports_v7174.RptDef.

- Click the **Open** button to return to the **Select report file to import** dialog. The file name and location you have specified are displayed in the **Archive file** field.



- Where the specified file contains more than one report, you have the option to import selected reports only. If you do not wish to import a report, deselect the check box adjacent to the description.

NOTE: If you are re-importing a report that already exists on your system, the existing report is overwritten and, therefore, any changes are lost.

- If you do not wish to import the associated templates (e.g. Word templates), deselect the **Import associated templates** check box.
- To **Overwrite existing report definitions**, select the associated check box.
- Click the **Import** button. The status of the imported report(s) change(s) to **Imported**.
- Click the **Close** button to complete the process and close the dialog.

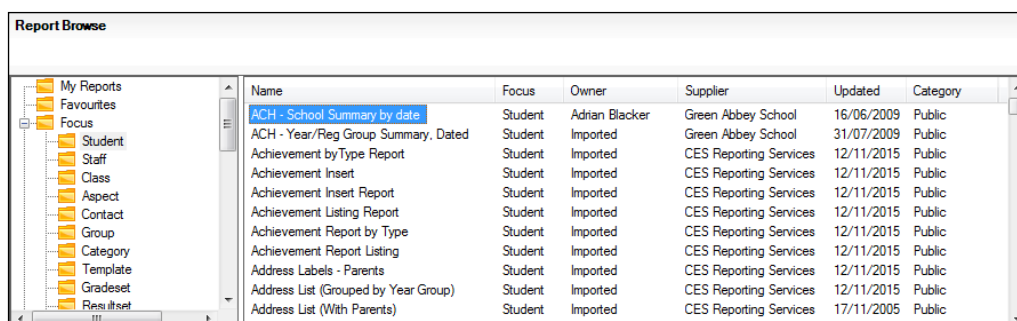
All reports are stored on the Document Management Server. Imported reports are automatically stored in the appropriate **Focus** folder (e.g. **Student**, **Staff**, **Class**, etc.) but can be copied to other folders if required (provided you have sufficient permissions). However, you are not able to copy any of the imported predefined reports to your **My Reports** folder, as you did not create them.

NOTE: The availability of reports depends on the permissions assigned to you and whether report designs have been made public. Permissions can also be applied to specific data fields and it is therefore possible that some reports can be produced, but may have some blank columns.

Viewing a Predefined Report

Once you have successfully imported a selection of the predefined reports, you need to log out of SIMS and log back in again before the newly imported reports are available for use.

1. Select **Reports | Run Report** to display the navigation tree.



2. Expand the **Focus** folder to view all the different report folders.

In some cases, you are prompted to enter or select run-time parameters when running a report. These parameters are used to restrict the records returned in the resulting report. You may, for example, be prompted to select the Year Group on which the report should be based.

3. Double-click a report definition of your choice to display the **Enter parameter values for report** dialog.

This dialog looks slightly different from one report to another, due to the variety of data fields that are contained within each report.

4. Select any of the check boxes displayed or click the **Select All** button to select all of the check boxes in each panel of the dialog.
5. Click the **OK** button to produce the report.

6. The report can now be viewed or printed.

07/ Report Storage Management

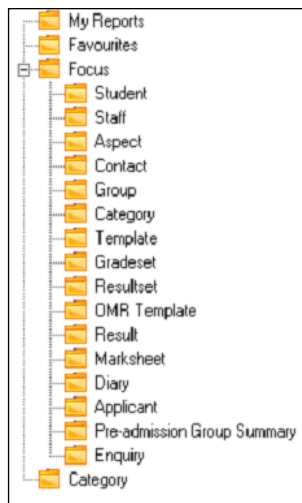
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Introduction

The Document Management Server is used to manage the storage of reports, templates, data required selections and report criteria conditions. These are collectively referred to as saved items. The Document Management Server contains the following main default folders:

- `My Reports\Templates` is used to store all saved items created by you.
- `Favourites` is used to store any publicly available saved items or saved items that you copy there.
- `Focus` contains sub-folders for `Student`, `Staff`, `Class`, `Aspect`, `Contact`, etc. These folders are used to store any publicly available items.
- `Category` is initially empty but users with appropriate permissions can create Report Categories which generate category sub-folders. You may for example, create Report Categories for each department within your establishment, e.g. `Science`, `Maths`, `English`, etc.
- `Owner` contains sub-folders of all available report owners, which contain all the reports assigned to that owner. With the required permissions, it is possible to re-assign the ownership of a report from one person to another, by dragging the report(s) into the required owner's folder.

When saving a report, a copy is automatically stored in the **My Reports** folder and is only available for editing by you, its creator.



However, it is possible for the report to be made **Public** at the time of saving, if required. Making a report public, places a copy in the appropriate **Focus** folder and users with appropriate permissions can then open and edit your original report but must then save the report with a different name.

If the report was saved as private, it can subsequently be made public by copying it to the appropriate **Focus** or **Category** folder.

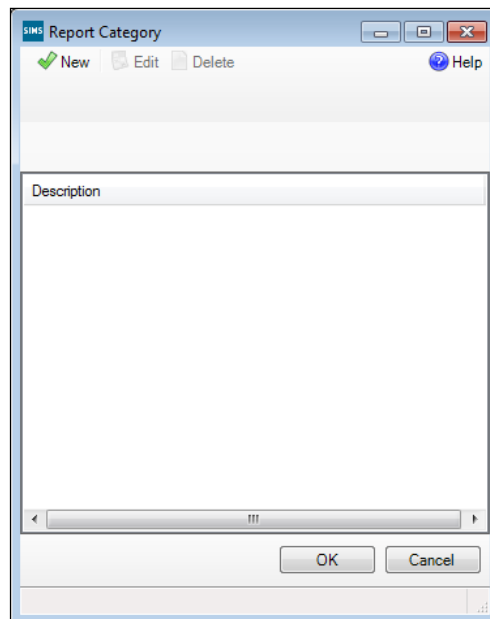
Making a report public also enables other users with appropriate permissions to run reports that you have created and saved as public.

Managing Report Categories

Creating a **Report Category** generates a folder within the **Category** folder of the **Reports** browser. Once created, you can save to, or open files from, any **Report Category** folder.

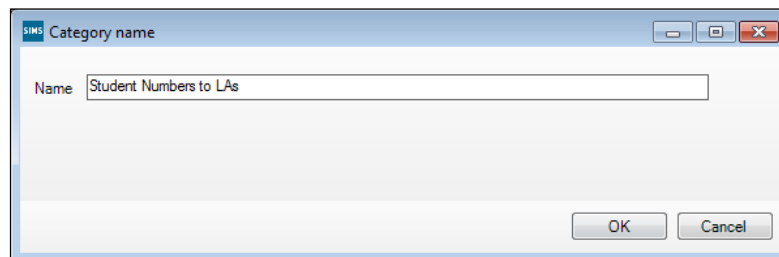
1. Select **Reports | Export** to display the **Select reports to export** browser or open an existing report via the Report Designer (**Reports | Design Report**).

2. Click the **Tools** button and select **Category** to display the **Report Category** dialog.



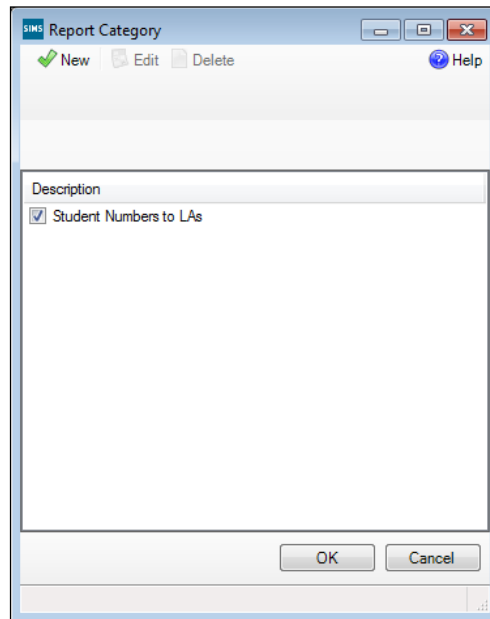
Adding a Category

1. Click the **New** button or right-click anywhere in the **Description** panel and select **Add** from the pop-up menu to display the **Category name** dialog.



2. Enter a name for the new category up to a maximum of 40 alphanumeric characters (including symbols).

- Click the **OK** button to return to the **Report Category** dialog.



- Click the **OK** button to save the **Category**.

Editing an Existing Category

- Click the **Category** name, then click the **Edit** button.
Alternatively, double-click the required **Category** name, or right-click the name and select **Edit** from the pop-up menu to display the **Category name** dialog.
- Edit the category name as required (maximum of 40 alpha/numeric characters, including symbols).
- Click the **OK** button to return to the **Report Category** dialog.
- Click the **OK** button to save your changes.

Deleting a Category

Only a link to the report is stored in the Report Category folder and it is therefore possible to delete a Report Category without deleting the reports themselves.

- Highlight the category name and click the **Delete** button or press the **Delete** key. Alternatively, right-click the name and select **Delete** from the pop-up menu.

WARNING: The Category is deleted immediately. If a Category is deleted in error, click the **Cancel** button to restore.

- Click the **OK** button to save your changes.

Activating/Deactivating Report Categories

Activating Report Categories ensures that they are displayed as sub-folders in the main **Category** folder. Newly created categories are activated by default.

The check box adjacent to a **Report Category** name indicates whether the category is active.

Select the check box to activate a category and deselect the check box to deactivate the category. You are not be able to see any deactivated Report Categories.

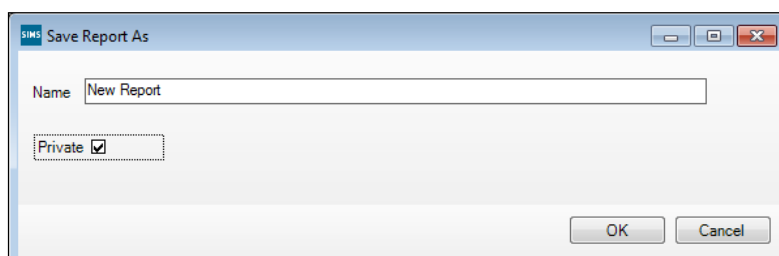
Saving Report Designs

Saved reports are stored by default on the **Document Management Server**.

They are only available for viewing and editing by yourself, unless they are made Public (available to other users with appropriate permissions) at the point of saving, by ensuring that the **Private** check box is deselected.

Alternatively, you can make existing reports Public by copying them to the appropriate Public folder, e.g. **Focus** or **Category**.

1. Click the **Save As** button on the Report Designer toolbar to display the **Save Report as** dialog. Alternatively, click **Save my report** in the **Report Complete** panel.



2. Enter a name for the report. This can be up to 40 alphanumeric characters (including symbols).
If you wish to make the report Public (available to others with appropriate permissions), deselect the **Private** check box.
This automatically stores a copy of the report in the appropriate **Focus** folder which can then be accessed by users with suitable permissions.
If you choose not to do this now, you can subsequently make a report public by copying it to the **Focus** folder or the appropriate **Category** folder.
3. Click the **OK** button to save the report to the Document Management Server.
4. To overwrite the saved report, click the **Save** button.

NOTE: Check that the Report Categories are marked as active if you wish them to be visible.

Making Reports Public

By default, all reports are stored in your **My Reports** folder and only you can edit or run them. You can make a report **Public** when saving by ensuring the **Private** check box is not selected. This saves a copy of the report into the appropriate **Focus** folder.

For example, you have designed a report using the **Students Focus** and wish to make the report **Public**. When you save, deselect the **Private** check box and a copy of the report is then be saved in both the **My Reports** and **Students focus** folder.

Alternatively, you can copy the report to a **Public** folder after the report is saved.

The following are classed as **Public** folders: **Focus** folders, **Category** folders and their respective sub-folders.

NOTE: Individual users must activate specific report Categories for them to be visible. Therefore, if you save a report to a specific report Category folder, only those users who have activated that Category can see your report via the Category main folder.

Deleting Saved Reports and Report Criteria

It is possible to delete reports that you have created. With the required permissions, you can delete the reports of others. The master copy of each item is stored in your **My Reports** folder. You must delete the item from this folder if you wish to permanently delete it. Deleting a report from any other folder simply prevents that item from being accessed from that location.

Select **Reports | Design Report** to display the **Report Designer**.

Deleting a Report

1. Click **Open an existing report** to display the **Open Report** (report browser) dialog.
2. Navigate to the required report.
3. Highlight the report name then press the **Delete** key. A confirmation dialog is displayed. Click the **OK** button to complete the process. Alternatively, right-click the report name and select the **Delete** button.

Deleting a Report Template

1. From the **Define presentations** panel, select **Word List Report**. The associated Word list report settings are displayed in the right-hand screen.
2. Select the **User-defined template** radio button to display the **Select a base template** dialog.
3. Navigate to the template to be deleted.
4. Highlight the template name and press the **Delete** key. A confirmation dialog is displayed. Click the **Yes** button to complete the process.

*NOTE: The **Standardlandscape.dot** and **Standardportrait.dot** templates are read-only and cannot be deleted.*

Exporting Reports

Reports can be exported for use by other departments, establishments or agencies as required. Where appropriate, you are provided with the option to export any documents associated with the report. These include Word templates and mail merge documents that define the design of the resulting report. If you elect not to export these associated documents, you must ensure that alternatives are available in order to ensure the report is produced correctly.

1. Either select **Reports | Run Report** to display the **Reports** browser or if in Design Mode, click the **Select** button on the toolbar to display the **Reports** browser.
2. You must first select the report you wish to export. Select the folder in which the report is stored. All reports within the folder are displayed in the right-hand panel. Expand and contract the folder structure by clicking the + or – icons as required.
3. Select the required report and click the **Tools** button then select **Export**, or right-click the required report name and select **Export** from the pop-up menu.
4. The **Export Report** dialog is displayed with the selected report listed in the **Report** field. Click the **Select** button adjacent to the **Destination** field and select the folder in which to store the exported report.
5. If the report has documents associated with it (such as Word templates), appropriate check boxes are selected in the **Associated Documents** panel. Deselect the check boxes if you do not wish to export these documents.

NOTE: Report outputs may not appear correctly if the associated documents are not available. If you elect not to include these documents in the export file, you must ensure that suitable alternatives are available to run the report.

6. Click the **Export** button to complete the process.

Changing Ownership of a Report

With the required permissions, it is possible to change the allocation of a report (whether **Public** or **Private** status) from one staff member to another. This is particularly useful if, for example, a staff member who is the owner of a report leaves the school.

1. Select **Reports | Design Report**, then click **Open an existing report** to display the **Report Browser** and expand the **Owners** folder.
2. Select the current owner of the report that is to be re-assigned. This displays all the reports that they own.
3. Hold the **Ctrl** key to select multiple individual reports, or hold the **Shift** key to select a block of reports. Click and drag the relevant report(s) into the folder of the new owner.
4. A warning message displays to confirm the re-assignment. Click the **Yes** button to continue. Clicking the folder of the new owner now displays the re-assigned report(s), and the **Owner** column confirms that the ownership of the report has been re-assigned to that staff member.

08/Running Scheduled Reports

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Introduction

Many members of staff within a school perform a variety of regular tasks and they require the ability to manage these tasks effectively within SIMS. Staff can now set up an automated scheduler to run selected reports for them. The details of these reports can be viewed from the **My Scheduled Reports** panel on their personal Home Page.

Setting up the Report Scheduler

It is recommended that users most frequently responsible for setting up the scheduling of AutoReports, should have access rights for the entire domain area of SIMS to enable them to view the detail.

Permissions Required

Any valid SIMS user can setup a scheduled task using the AutoReports.exe. However, for running any scheduled reports, permissions for the following processes in SIMS are required:

- **Designing or Running a Report** - users must have sufficient access rights to design or run the existing report.
- **Execute Scheduled Report** - users must have sufficient access rights to execute the scheduled report.
 - a. The execute scheduled task permission can be checked via **Focus | System Manager | Manage Users**.
 - b. Search for then double-click the name of the applicable user to display the **User Details** page.
 - c. In the **Permissions** panel, navigate to **Core, Home Page, Report Execution Manager, Execute Scheduled Report, Execute**.
- **Document Management Server** - users must have sufficient rights to access the Document Management Server (DMS), to ensure that it is configured and running correctly. This permission is also required for running the report definitions and for storing the report outcomes on the Document Management Server.

Users of SIMS can now specify the names of individual reports that they want to be run automatically, at any time during the day and during off peak times for example, overnight. The benefit of running the reports at off peak times enables system administrators to minimise any potential performance issues that may otherwise be experienced by users.

To enable users to benefit from the automatic running of reports, system administrators must first specify an automated task using the Windows® Scheduled Task wizard.

Creating a Scheduled Task - Windows 7

The automated task should be set up on the SIMS SQL server machine where the SIMS database is held. The task only runs successfully if the Document Management Server and the SIMS SQL server machine are both available. Once the automated task has been set up, individual users can specify which reports they want to run automatically on their PCs.

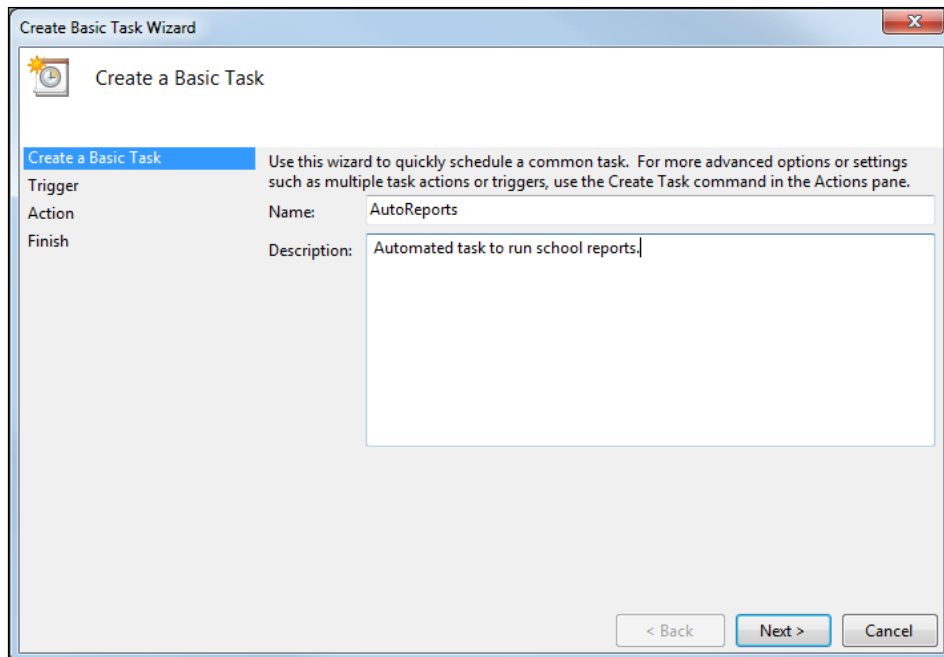
1. Ensure that you have logged into Windows as an administrator.
2. Click the Windows **Start** button to display the **Start menu**.
3. Select **All Programs | Accessories | System Tools | Task Scheduler** to display the **Task Scheduler** page.

Alternatively, click **Control Panel** then **System and Security**.

If administrator rights have been set up you may be required to enter a **Password**.

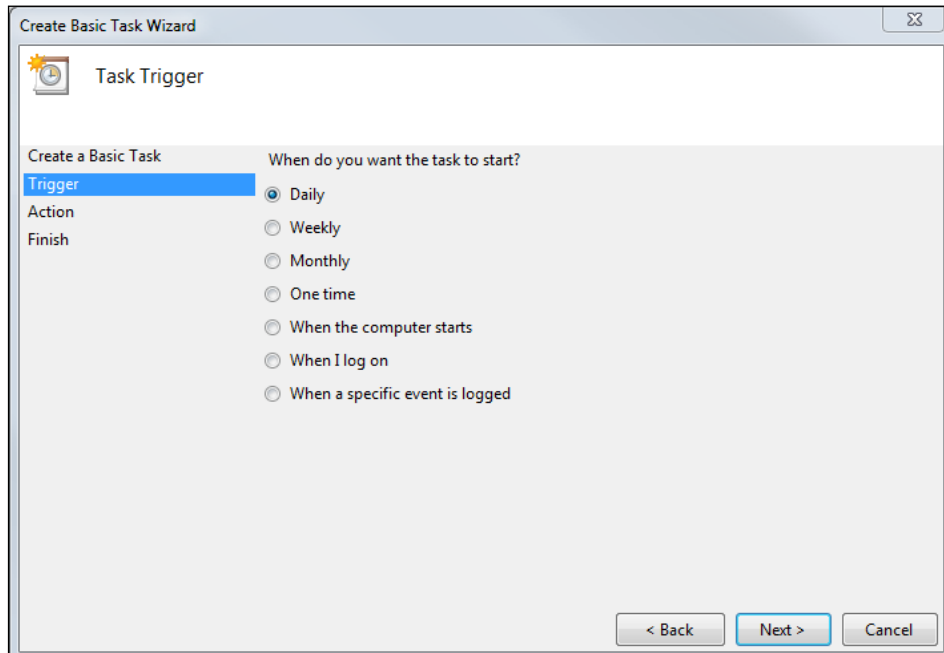
4. Select **Action | Create Basic Task** to display the **Create Basic Task Wizard**. Alternatively, select **Create Basic Task** from the **Actions** panel.

5. Enter a suitable **Name**, e.g. AutoReports, and a **Description** (optional) for the scheduled task.



The screenshot shows the 'Create Basic Task Wizard' window. The title bar says 'Create Basic Task Wizard'. The main area has a sidebar on the left with 'Create a Basic Task', 'Trigger', 'Action', and 'Finish'. The 'Create a Basic Task' tab is selected. The main content area says: 'Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.' Below this, there are two input fields: 'Name:' with the value 'AutoReports' and 'Description:' with the value 'Automated task to run school reports'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

6. Click the **Next** button to display the **Task Trigger** page.



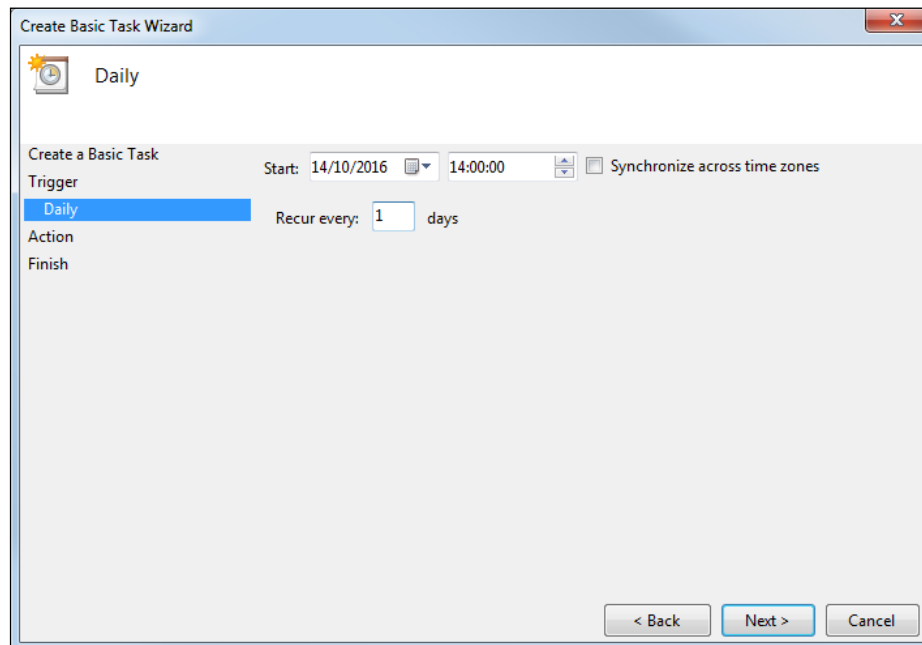
The screenshot shows the 'Create Basic Task Wizard' window, now on the 'Task Trigger' page. The sidebar on the left has 'Trigger' selected. The main content area has the title 'Task Trigger' and the question 'When do you want the task to start?'. Below this, there are seven radio button options: 'Daily' (selected), 'Weekly', 'Monthly', 'One time', 'When the computer starts', 'When I log on', and 'When a specific event is logged'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

7. Select the appropriate radio button to indicate when you require the task to start.

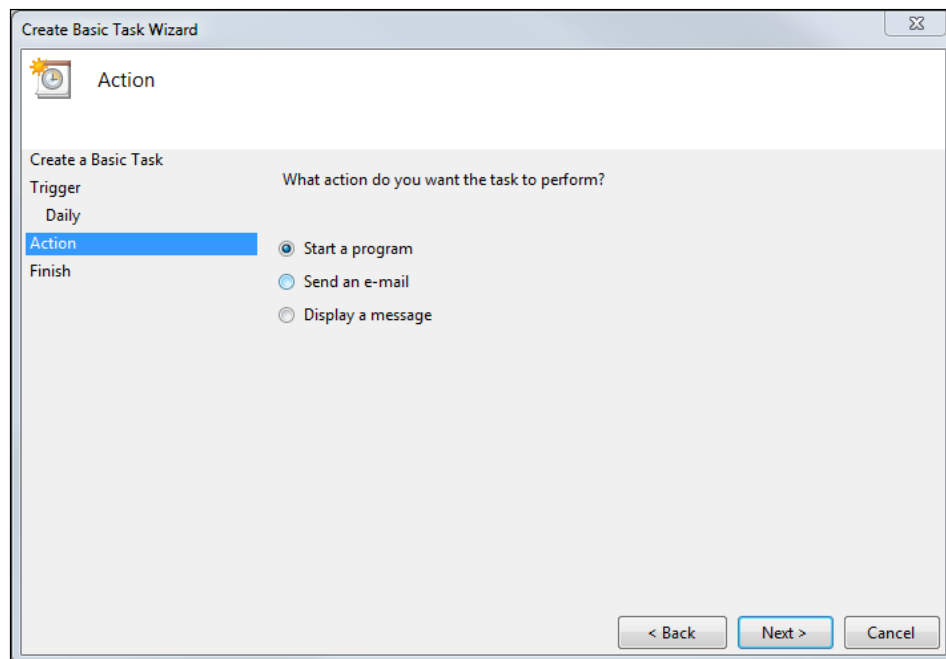
Depending on the number of reports to be run, selecting the **Daily** option is most likely to provide a satisfactory result.

*NOTE: Before setting up the Windows Scheduled Task, system administrators may wish to canvass the opinion of senior users to ensure that the frequency of the task is sufficient for their purposes. For example, the frequency of the reports scheduled to run automatically in SIMS must be set to run **Daily** if the Windows Scheduled Task has been set to run on a **Daily** basis.*

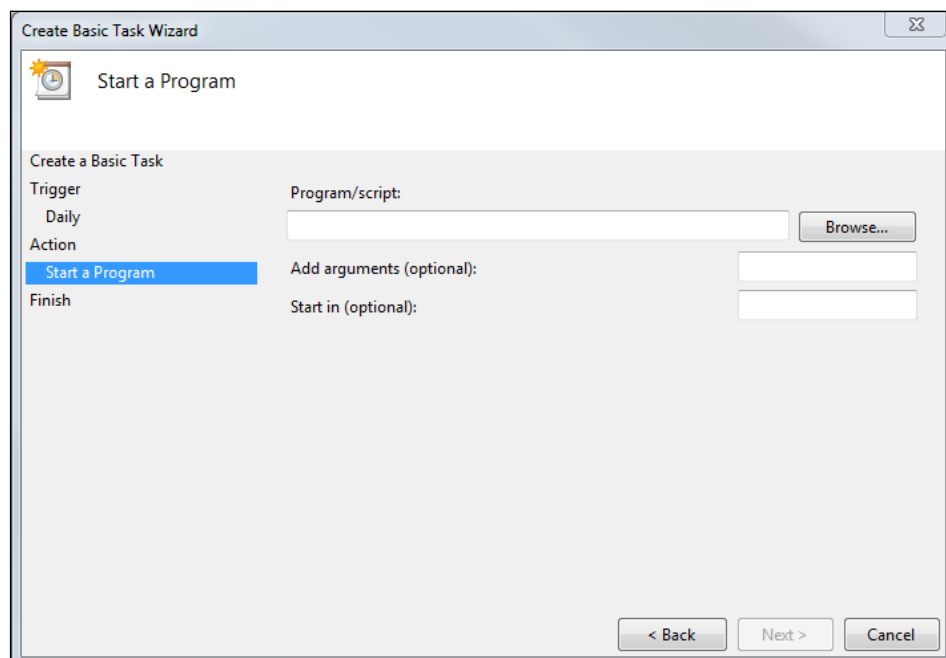
8. Click the **Next** button to display the **Daily** page.



9. Specify the day, month, year and time that the task is required to **Start**.
10. Enter the frequency of days that you wish the scheduled task to run in the **Recur every: [number] days** field.
11. Click the **Next** button to display the **Action** page.



12. Ensure that the **Start a program** radio button is selected.
13. Click the **Next** button to display the **Start a Program** page.



14. Click the **Browse** button and navigate to C:\Program Files\Microsoft SQL Server\MSSQL\$SIMS\Binn (where C: is the network drive where SIMS is installed).

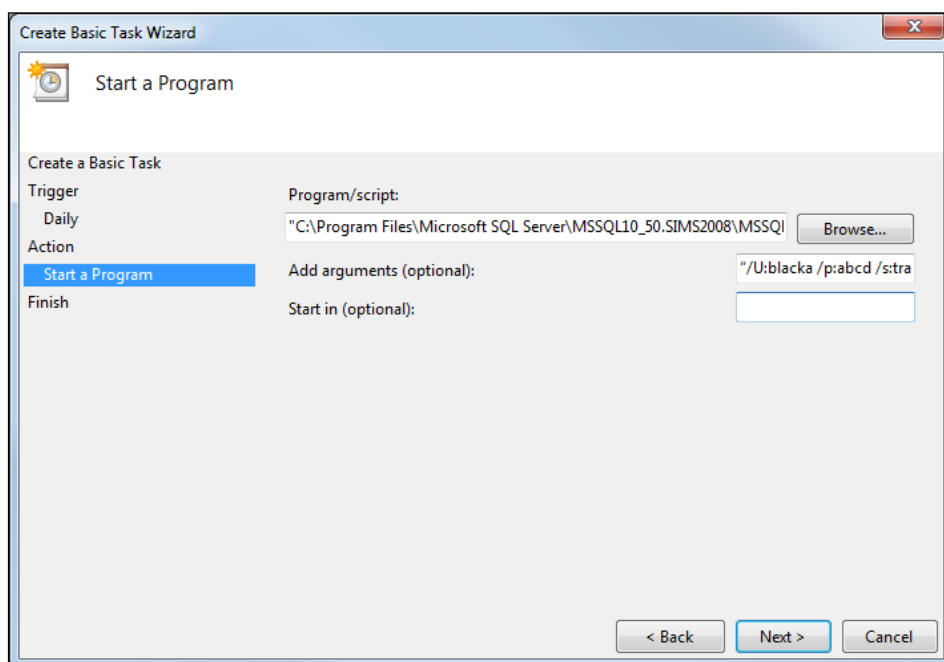
For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or local Support.

15. Highlight the applicable scheduled task filename, e.g. AutoReports.exe then click the **Open** button to return to the **Start a program** page.
16. Enter the following text in the **Add arguments (optional)** field:
"S:<servername>\<SQLinstance>◇/D:<database>◇/U:<simsuser>◇
P:<Password>"
or for Trusted authentication:
/S:<servername>/<SQLinstance>◇/D:<database>◇/T

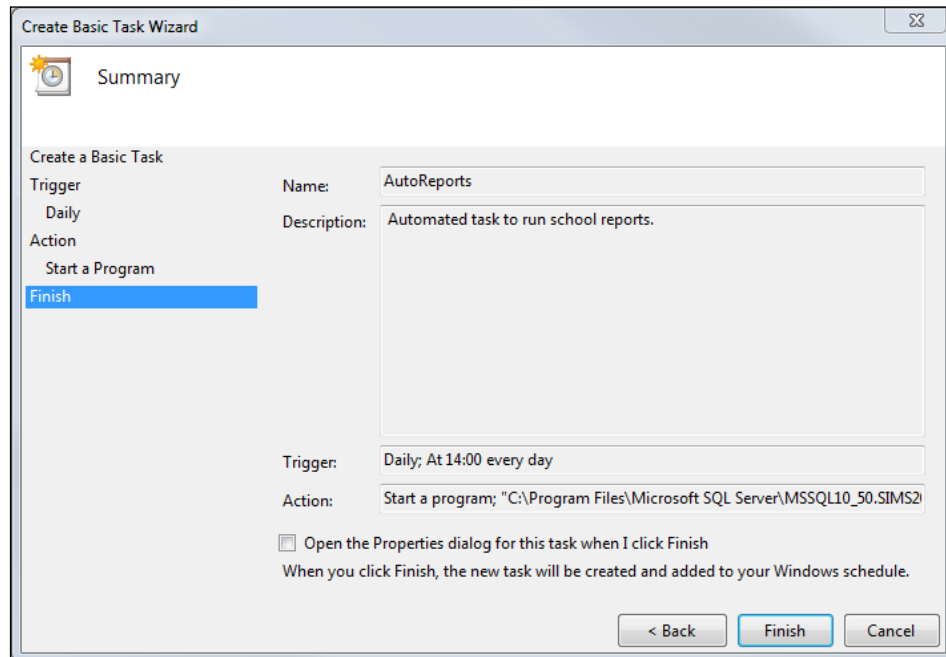
IMPORTANT NOTES:

It is essential that spaces are included, as indicated by the '◇' symbol in the previous examples.

Archiving parameters are case sensitive.



- Click the **Next** button to display the **Summary** page.

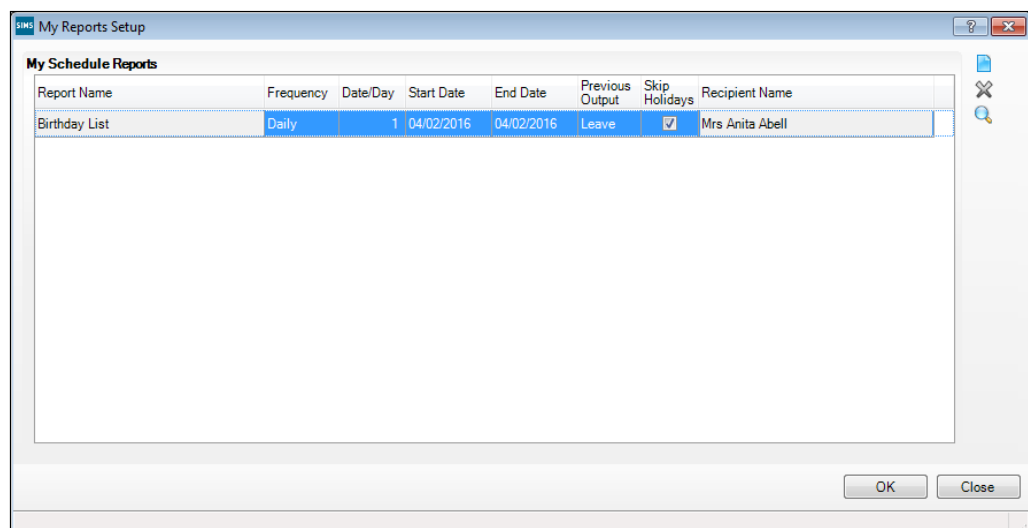


- Click the **Finish** button to return to the **Task Scheduler** page where the newly created scheduled task is displayed in the **Active Tasks** panel.

Selecting Reports for Scheduling

- Click **Focus | Alerts | Schedule Reports** to display the **My Reports Setup** dialog.

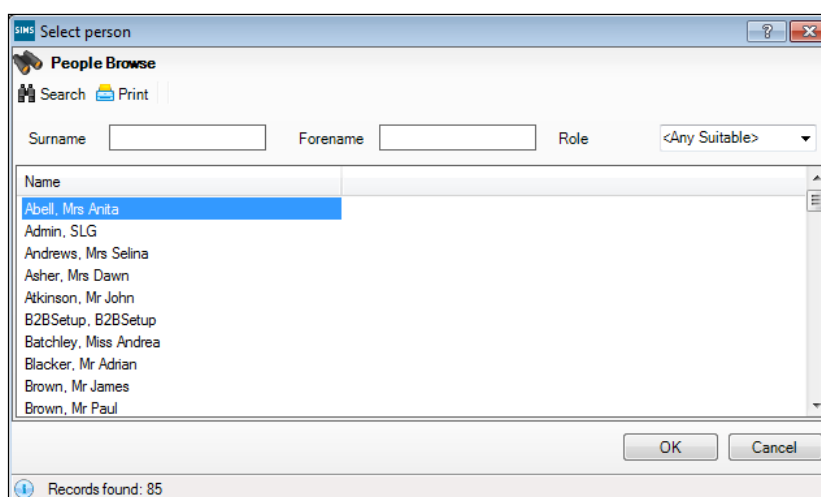
Any existing reports that have already been scheduled are displayed in the **My Schedule Reports** panel. The **Report Name**, **Frequency**, **Date/Day**, **Start Date**, **End Date**, **Previous Output**, **Skip Holidays** indicator and the **Recipient Name** are all listed.



It is possible to amend any or all of the current scheduled report details from this dialog.

*NOTE: Users must ensure that reports are scheduled in line with the Windows Scheduled Task that has been set up. For example, selecting the **Frequency** of the reports in SIMS to run on a **Daily** basis is not very beneficial if the Windows Scheduled Task has been set up to run on a **Weekly** basis.*

- **Changing the Frequency**
Identify the required report, click into the **Frequency** field and select an alternative frequency from the drop-down list.
- **Changing the Date/Day**
Identify the required report, click into the **Date/Day** field and overtype the current number. As **Monthly** is the last option in the **Frequency** field, the maximum number entered in the date/day field cannot exceed **31**.
- **Changing the Start Date/End Date**
Identify the required report, click into the **Start Date** or the **End Date** field and click the drop-down arrow to display the **Calendar**. Select an alternative date. The **End Date** selected must be greater than the **Start Date**.
- **Changing the Previous Output**
Identify the required report, click into the **Previous Output** field and select either **Leave** or **Delete** from the drop-down list.
- **Changing the Skip Holidays Indicator**
Identify the required report, click into the **Skip Holidays** field and either select or de-select the check box.
- **Changing the Recipient Name**
Identify the required report and click the **Choose Recipient** button to display the **Select Person** dialog.

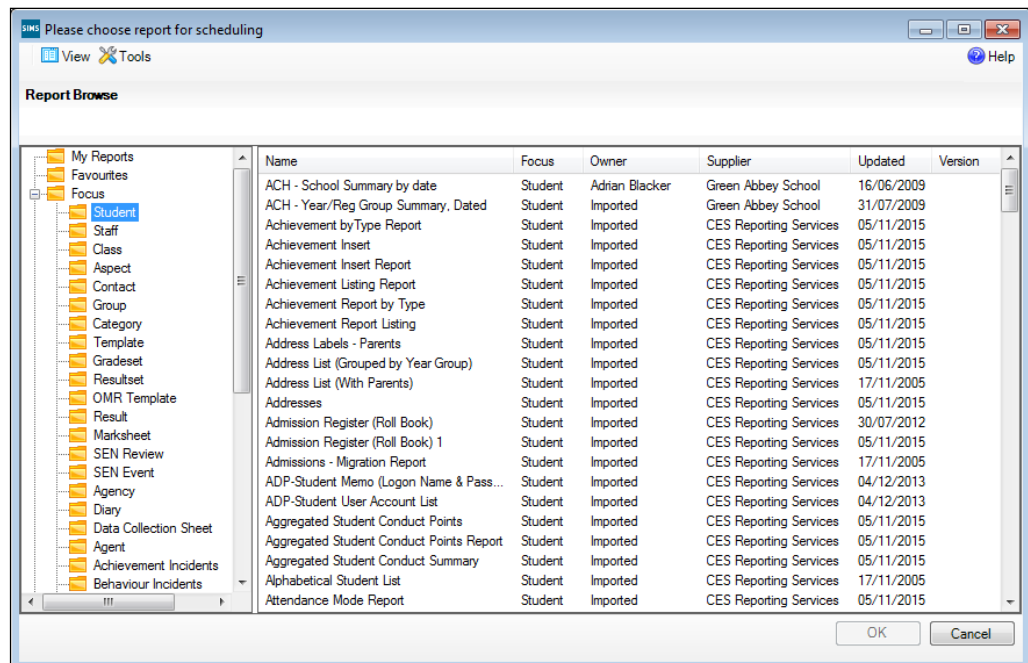


2. Enter the individual's **Surname** and/or **Forename**, or select their **Role** from the drop-down list.

3. Click the **Search** button to list all individuals who match the search criteria you have entered.
4. Highlight the required person from the list displayed and click the **OK** button to select them.

It is also possible to delete any previously scheduled report details from this dialog. Highlight the relevant report and click the **Delete** button to remove it from the schedule.

5. Click the **New Report** button to display the **Please choose report for scheduling** dialog.



6. In the left-hand side of the dialog, a list of all the existing report focus folders is displayed. Expand the list until you locate the required report definition.
7. Highlight the required report definition and click the **OK** button to add it to the schedule. Some reports require the entry of report parameters to be specified before they can be added to the report schedule.

In this case, the **Enter Parameter Values for Report** dialog is displayed.

The dialog box titled "Enter parameter values for report" contains three filter sections:

- Student Status is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "On Roll", "Leaver", "Pre-admission", and "Leaver (Deceased)". An "Accept All (bypass filter condition)" checkbox is below.
- Year group is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "Year 7", "Year 8", "Year 9", "Year 10", and "Year 11". An "Accept All (bypass filter condition)" checkbox is below.
- Reg group is:** Includes buttons for "Select All", "Clear All", and "Show All". A list of checkboxes contains "10A", "10B", "10C", "10D", and "10E". An "Accept All (bypass filter condition)" checkbox is below.

At the bottom right are "OK" and "Cancel" buttons.

When a report is designed, it is possible to apply various criteria to limit the records returned. For example, a report could be limited to all the pupil/students in a particular year.

To provide greater flexibility, it is also possible to enter values for these criteria when a report is run. You could for example, be prompted to select the **Years** that you wish to be included in the report. This enables you to run the same report, selecting a different year each time.

If a report has been set up in this way, when prompted to enter **Run Time Parameters**, you enter values, such as **Surnames**, choose existing values by selecting appropriate check boxes or specify a required date.

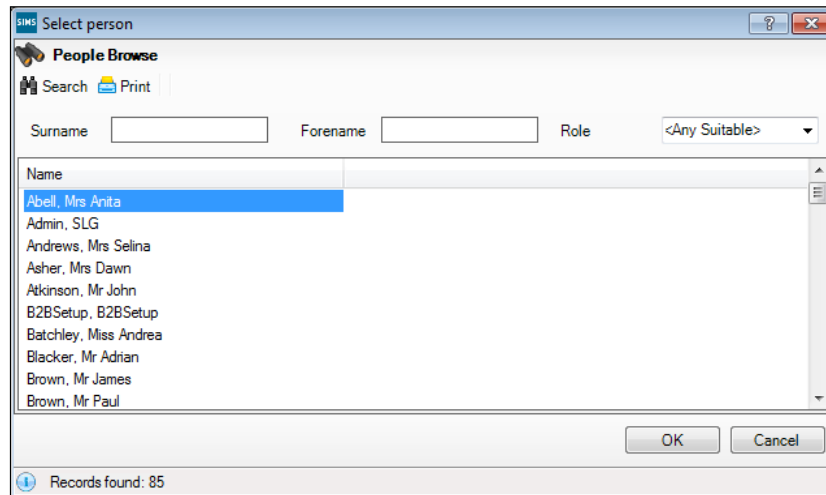
Users can refine the report using the **Show All** filter. This option is available when defining the run-time parameters and when designing a new report and specifying a new filter.

The **Show All** filter is switched off by default, thus ensuring that only active groups are displayed for selection.

Clicking in the **Show All** filter check box displays all groups, both active and inactive. For example, Year Groups and Registration Groups that are no longer in use and have been removed from the Pastoral Structure can be selected and included in the report.

8. Click the **OK** button to continue.

9. The **Recipient Name** defaults to the name of the user currently signed on to SIMS. Click the **Choose Recipient** button to display the **Select Person** dialog and identify an alternative recipient for the report output, if required.



10. Enter the individual's **Surname** and/or **Forename**, or select their **Role** from the drop-down list.
11. Click the **Search** button to list all individuals who match the search criteria you have entered.
12. Highlight the required person from the list displayed and click the **OK** button to select them.
13. Continue scheduling reports in this way until all the required reports are listed in the **My Reports Setup** dialog.
14. Click the **OK** button to close the dialog.

Viewing Errors in the Schedule

If users experience problems with the AutoReports scheduled task that they have set up, we recommend accessing the Event Viewer through **Start | Control Panel | Administrative Tools | Event Viewer** to check for errors.

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