



How to Design a Simple Report

Applicable to SIMS .net version

7.108 onwards.

Permissions required

You will need to be a member of any of the following user groups in System Manager to design reports: *Assessment Coordinator, Class Teacher, Pastoral Manager, School Administrator, Senior Management Team, System Manager, Teachers' Desktop User.*

Introduction

This help sheet describes how to produce a simple report, with an example used throughout to show how a simple pupil/student list output to Microsoft® Word can be produced. The example report is designed with the following criteria:

Fields: Surname, Legal Forename, Gender, Reg Group and Year Group

Sort Order: Reg Group and Date of Birth

Filters: Year Group 6 only

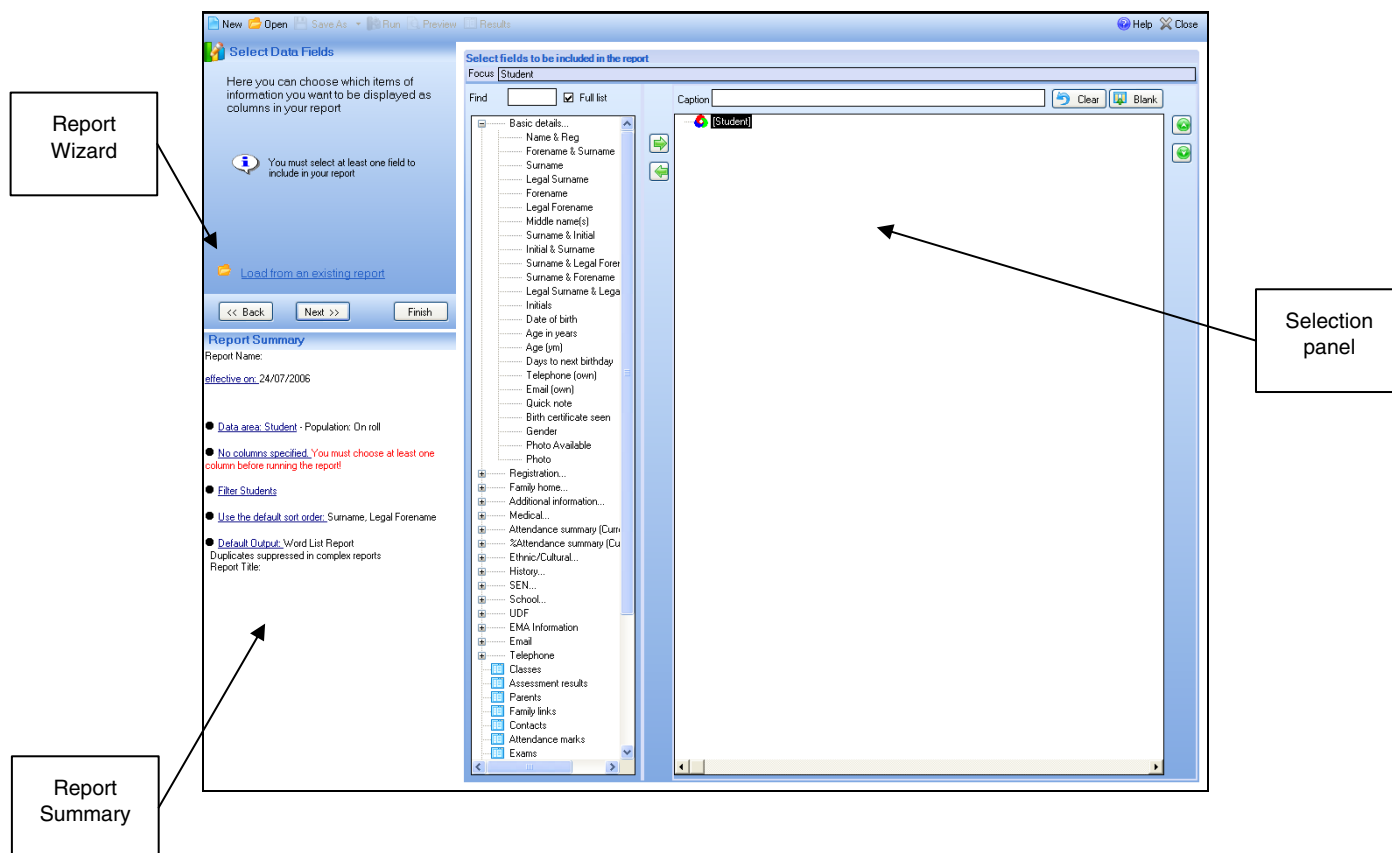
There are six key processes in producing a report:

1. Select the data area (the Focus of the report, e.g. Students, Staff, etc.).
2. Select the data fields (the columns/fields of data to extract from SIMS .net, e.g. Surname, Forename, etc.).
3. Apply a filter (used to restrict the records that are included, e.g. Year 6 pupil/students, all female pupil/students, etc.).
4. Define a sort order (select fields on which to sort the report, e.g. order by Surname, Gender, Date of Birth, etc.).
5. Specify the effective date if required. By default, reports are based on today's date, but can be based on any date, e.g. list the pupil/students 6 months ago.
6. Define presentations (decide on the report output, e.g. Word, Excel, HTML, etc.).

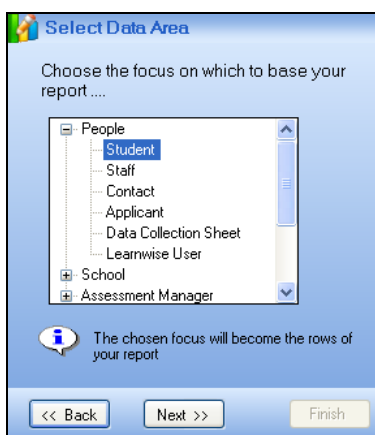
Overview of the Report Designer

The Report Designer consists of three main sections:

1. Report Wizard
2. Report Summary
3. Selection panel



The **Report Wizard** guides you through the report creation process. As you click the **Next** button, the **Selection** panel changes according to the process being carried out. The previous example shows the data fields being selected. Move forward and back (if necessary) through the Wizard, by clicking the **Next** and **Back** buttons until the report selections have been completed. The following example shows the first page of the **Report Wizard**:



The **Report Summary** displays a summary of the report selections so far and includes a set of hyperlinks which can be used to launch the specific area of the report design.



Report Summary

Report Name:

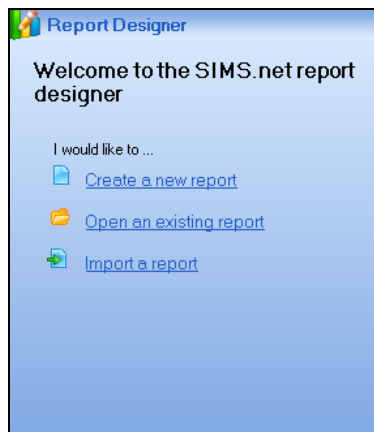
effective on: 24/07/2006

- Data area: [Student](#) - Population: On roll
- Data Fields: Surname, Legal Forename, Date of birth, Gender, Reg group, Year group, Blank column
- Filter Students where:
Year group is Year 6
- Sort Order: Reg group, Surname, Legal Forename
- Default Output: Word List Report
Duplicates suppressed in complex reports
Report Title:

For example, clicking the **Sort By** hyperlink will display the **Define Sort Order** page of the **Report Wizard** together with **Select the fields on which to sort** panel on the right-hand side of the Report Designer.

Creating a new report

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



Report Designer

Welcome to the SIMS.net report designer

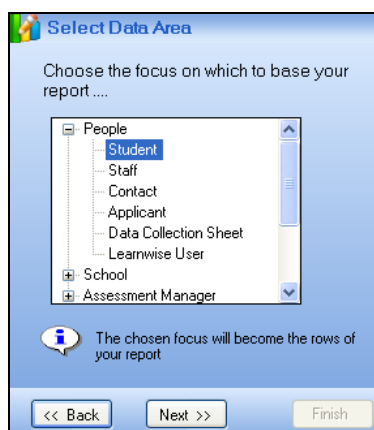
I would like to ...

-  [Create a new report](#)
-  [Open an existing report](#)
-  [Import a report](#)

2. Click the **Create a new report** hyperlink to display the **Report Wizard** and **Report Summary**.

Selecting the data area

The data area is the Focus of the report, e.g. Student, Staff, Contact, etc. In this example, the report will be based on the Student Focus.



Select Data Area

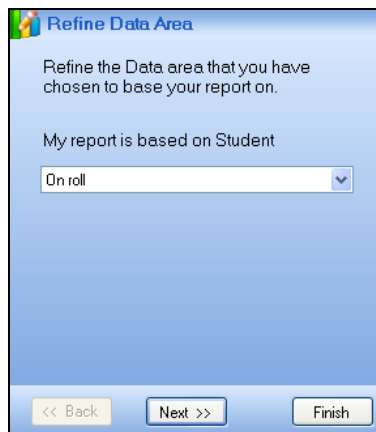
Choose the focus on which to base your report

- People
 - Student**
 - Staff
 - Contact
 - Applicant
 - Data Collection Sheet
 - Learnwise User
- School
- Assessment Manager

 The chosen focus will become the rows of your report

<< Back Next >> Finish

1. Select **Student** and click the **Next** button on the **Report Wizard** to move to the **Refine Data Area** page.

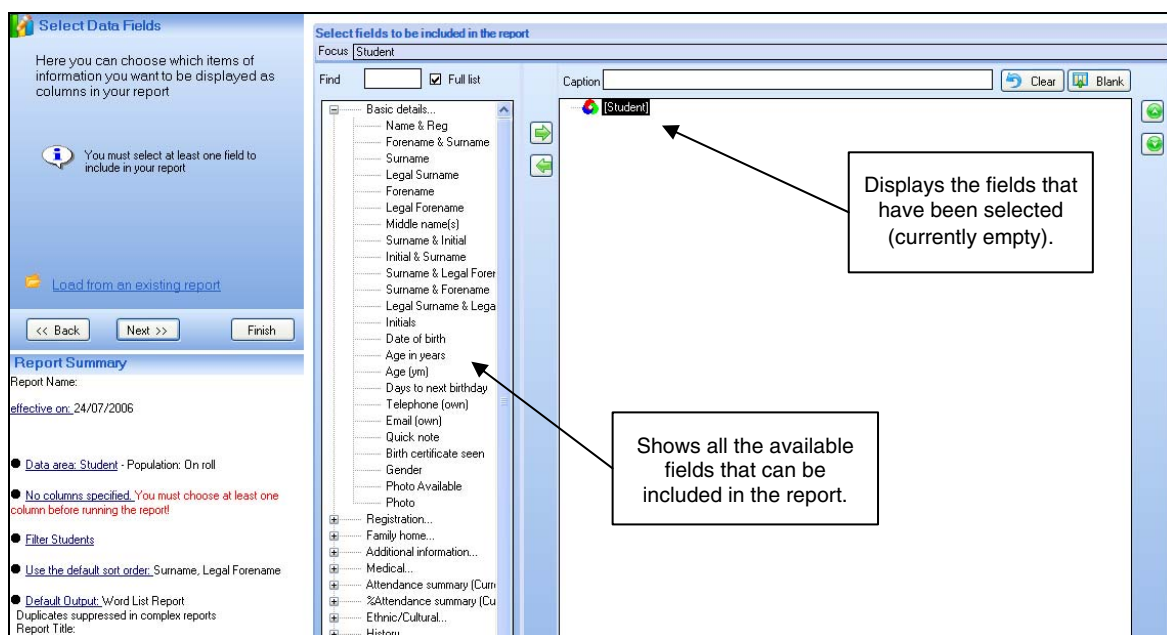


In some circumstances (such as creating a Student Focus report), you will be prompted to refine the data area. In this example, you can choose whether the pupil/students are **On-Roll**, **Accepted**, **Pre-Admissions**, **Leavers** or **All Students**.

2. Select **On roll** and click the **Next** button on the **Report Wizard** to move to the **Select Data Fields** page.

Selecting the Data Fields

The data fields are the columns or fields of SIMS .net data to include in the report.



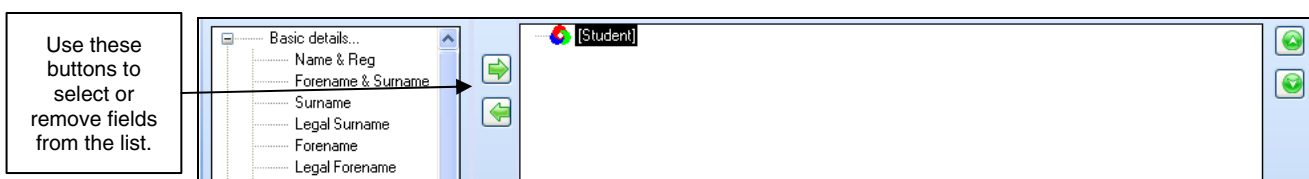
The left-hand pane of the **Select fields to be included in the report** panel, displays the available fields and the right-hand pane shows the fields that have been selected for inclusion.

1. Navigate to the required fields by expanding and contracting the list using the + and – icons as required. Either double-click a field to select it or, alternatively, click the field and then click the **Add field to selected list** button (right arrow).



Add field to selected list button

2. Repeat until all the required fields have been selected as shown in the following example:



- The report will include the fields listed in the right-hand panel. Any fields selected in error can be deleted by highlighting them and pressing the **Delete** key or clicking the **Remove field from selected list** button (left arrow).



Remove field from selected list button

Inserting a blank column

- There may be occasions when you want to add a blank column to a report, perhaps for entering hand written information or for use as a tick list for example. This is achieved by clicking the **Blank** button.

- The blank column is inserted at the end of the field list, but can be moved to appear in a different order as described in the *Changing the field/column display order on page 5*.

Changing field/column headings (captions)

When added, each column is given a default caption, such as **Surname**. This can be easily changed by highlighting the required field in the selected fields list and overtyping the default name in the **Caption** field, e.g. **Pupil Surname**.

The amended caption appears in angle brackets after the column name, e.g. **[Pupil Surname]**.

Changing captions can be particularly useful if, for example, both pupil/students and contacts are included in the same report, thus giving two **Surname** fields. This is particularly important if you intend to create Word mailmerge reports, as the captions are used to identify the merge field names.

In addition, if inserting blank columns, you will need to change the caption accordingly to identify what the blank column is for e.g. **Present?** or **Checked?**.

Changing the field/column display order

By default, the fields/columns are listed in the report, in the order they appear in the selected fields list, i.e. columns for Surname, followed by Legal Forename, Date of Birth, etc.

To change the order, highlight the required field and then click the **Move Up** or **Move Down** button until the field appears in the right order. Repeat as required.

Applying filters to the report

Filters are used to restrict the records included in the resulting report and consist of the following elements:

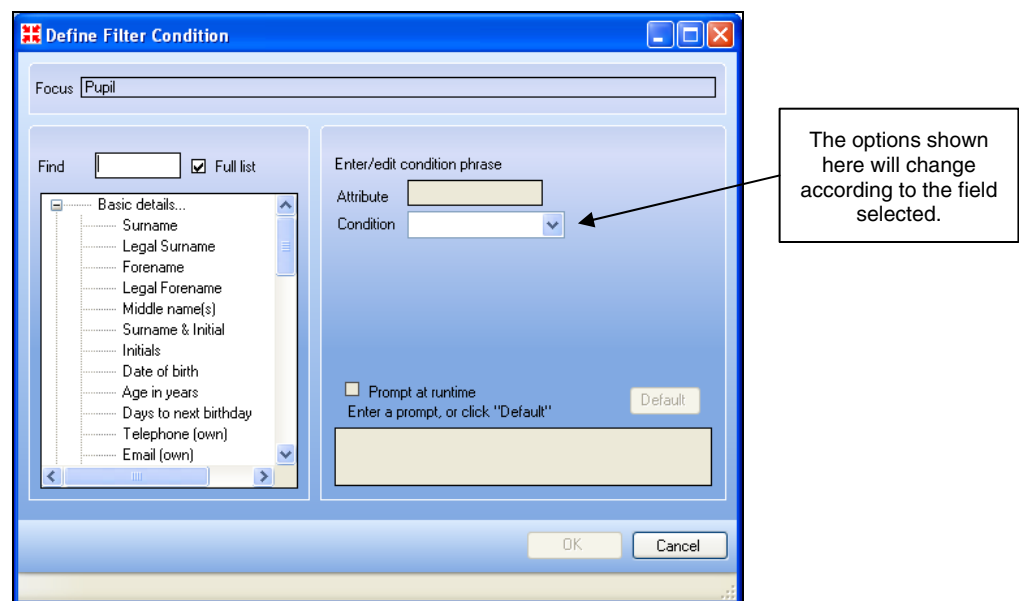
- Attribute** the item of data on which to filter, e.g. **Surname**, **Year Group**, **Gender**, etc.
- Condition** the condition to apply to the attribute, e.g. **Equals**, **is less than**, **begins**, **contains**, etc.
- Value** the actual value to filter against, e.g. **Smith**, **Year 12**, **Female**.
- Prompt** the text to display to the user at run-time, e.g. **Select Year Group**

This section describes how to apply a simple filter. For more detailed instructions on applying filters to reports, please see the *How to Add Filters to a Report Design* (SupportNet Resource Number 10216).

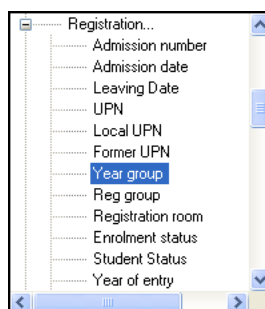
1. Once the required fields have been selected, click the **Next** button on the **Report Wizard** to move to the **Apply Filter** page.



2. From the **Define Filter** panel, click the **New** button to open the **Define Filter Condition** dialog.



3. Select the required **Attribute**, clicking the + or – icons to expand/contract the field list as required. In this example, the report is to be restricted to Year Group 6. Scroll down and expand the **Registration** list and highlight **Year Group**.



4. The **Enter/edit condition phrase** options will change according to the Attribute selected. Select the required **Condition** which in most cases will be **Is one of** (allowing you to choose the items that must match) or **Equals** (allowing you to enter a specific value). In this example, ensure that **is one of** is selected from the **Condition** drop-down list.

Enter/edit condition phase

Attribute: Year group

Condition: is one of

Select All ☒ Year 3
☐ Year 4
☐ Year 5
☒ Year 6

☐ Show All

☐ Prompt at runtime
 Enter a prompt, or click "Default"

Default

- Enter or select the **Value**, which in this example is **Year 6**.

*NOTE: With some values, such as Registration Groups, Year Groups, Look Up Values such as SEN Status, etc., only active items (e.g. this year's Year Groups) are available for selection. If you want to select from all the available items, ensure the **Select All** check box is selected.*

- You can allow the report user to select the value for the filter when the return is run (run-time parameters). If this is required, select the **Prompt at runtime** check box. A default prompt is entered in the lower section and is based on the Attribute name (e.g. **Year group**), which can be amended if required, e.g. **Please select the Year Group**. If needed, click the **Default** button to return to the default prompt.

☒ Prompt at runtime
 Enter a prompt, or click "Default"

Please select the Year Group

Default

- Click the **OK** button to add the filter and return to the **Define Filter** panel which displays the newly created filter as shown in the following example:

Define Filter

And... Or... Modify Delete

Students where
 Year group is Year 6 [?] "Please select the Year Group"

- Click the **Next** button on the Report Wizard to move to the **Define Sort Order** page.

Defining the sort order

The sort order determines the order in which the records will be listed in the resulting report. Each report is given a default sort order, such as Surname order for pupil/student based reports. The default order can be checked in the **Report Summary**.

The default order is displayed here.

Report Summary

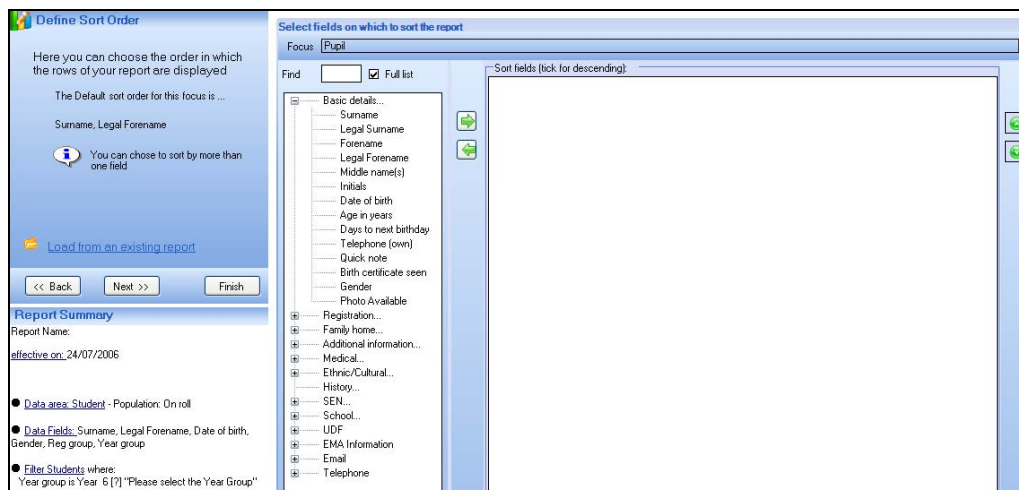
Report Name:

effective on: 24/07/2006

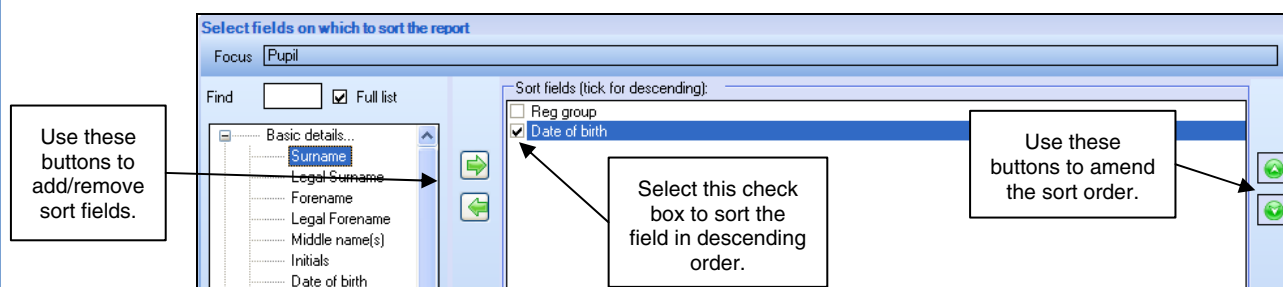
- **Data area:** Student - Population: On roll
- **Data Fields:** Surname, Legal Forename, Date of birth, Gender, Reg group, Year group
- **Filter Students where:**
 Year group is Year 6 [?] "Please select the Year Group"
- **Use the default sort order:** Surname, Legal Forename
- **Default Output:** Word List Report
 Duplicates suppressed in complex reports
 Report Title:

It is also possible to specify a different sort order as follows:

1. Navigate to the field on which you wish to sort the report, clicking the + or - icons as necessary.



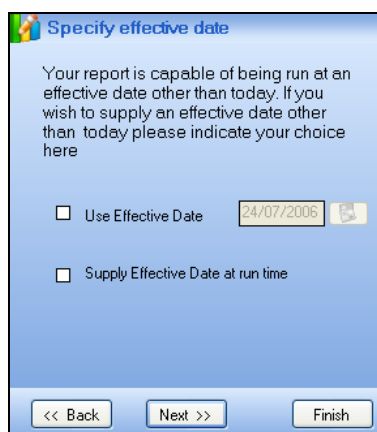
2. Double-click each required sort field or single-click and then click the **Include this field in the sort order** button (right arrow) to move the fields into the **Sort fields** pane.
3. Any unwanted fields can be removed from the **Sort fields** pane by highlighting the field and pressing the **Delete** key or clicking the **Remove this field from the sort order** button (left arrow).



4. The report will be sorted in the order the fields are listed in the **Sort fields** pane. Based on the previous example, the report will be sorted in Reg Group, then Surname order. Change the order if required, by highlighting the required field and clicking the **Up** or **Down** buttons until the required order is achieved.
5. Fields are automatically sorted in ascending order. To sort in descending order, select the check box adjacent to the appropriate field.
6. Click the **Next** button on the **Report Wizard** to move to the **Specify effective date** page.

Specifying the effective date (where required)

With certain reports (such as Student Focus reports), it is possible to specify an effective date (the date on which the report should be based). By default, reports are based on today's date, but you may prefer to produce a report on a given date in the past or future.



- If you wish to produce the report on today's date, click the **Next** button.
- To specify an effective date, select the **Use Effective Date** check box and select the required date by clicking the **Calendar** button, then click the **Next** button.



Calendar button

- To enable the user to select the effective date when the report is run, select the **Supply Effective Date at run time** check box, then click the **Next** button.

Designing the report output

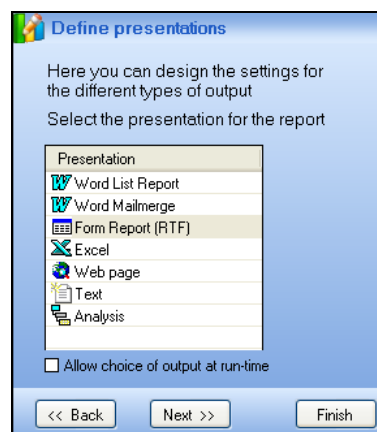
This section provides an overview of the report outputs available when designing reports, together with instructions on producing a simple Word List report. For more detailed instructions on each available report output, please refer to the help sheet list in each section.

There are currently seven different types of report output:

- Word List Report
- Word Mailmerge
- Form Report (RTF)
- Excel
- Web Page
- Text
- Analysis

Select the required report output from the **Presentation** list in the **Define presentations** page of the **Report Wizard**.

The right-hand panel will change according to the option chosen, to display the available settings. The opposite example shows the **Word List Report** output has been selected.



Designing a Word List report output

For more information, please see the *How to Design a Word List Report* help sheet (SupportNet Resource Number 10245).

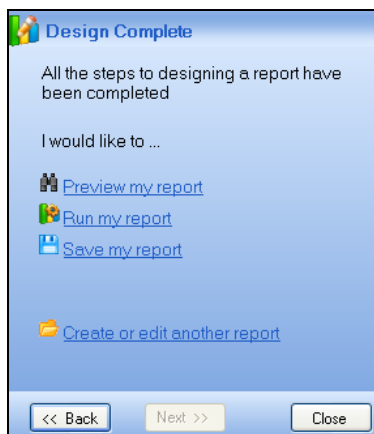
Use this report output to produce a Microsoft® Word document containing a simple table. The layout/design of a Word List report is determined by a previously created Word template.

1. Select **Word List Report** from the **Define Presentations** page of the **Report Wizard**. The **Word List Report Settings** pane is displayed.

2. Enter a title for the report in the **Report Title** field, if required.

3. Deselect the **Suppress duplicates** check box only if you want any duplicate records to appear in the report.
4. Choose the required template by selecting either of the following check boxes:
 - **Standard Portrait** – to fit on an A4 portrait page.
 - **Standard Landscape** – to fit on an A4 landscape page.
 - **User-defined Template** - if you wish to select or create a user-define template.

In the previous example, **Standard Landscape** has been selected to ensure that all the columns fit on the page.
5. Select the **allow this template selection to be made at run-time** if you want the user running the report to choose either portrait or landscape templates.
6. Click the **Next** button on the **Report Wizard** to move to the **Design complete** page.



When the report is run, Microsoft® is launched with the resulting output appearing similar to the following (which uses the standard landscape template):

Example Report						
Surname	Legal Forename	DOB	Gender	Reg	Year	
Balley	Richard	13 November 1994	M	6KH	Year 6	
Barker	Robert	21 June 1995	M	6KH	Year 6	
Braithwaite	Darren	03 December 1994	M	6KH	Year 6	
Choudhury	Nafaz	05 June 1995	M	6KH	Year 6	
Clayton	Rosy	11 September 1994	F	6KH	Year 6	
Friers	Marcus	29 March 1995	M	6KH	Year 6	
Goodchild	Fiona	12 December 1994	F	6KH	Year 6	
Hartley	Elizabeth	16 November 1994	F	6KH	Year 6	

Designing a Word mailmerge report output

For more information, please see the *How to Design a Word Mailmerge Report Output* help sheet (SupportNet Resource Number 10217).

Use this report output to produce a report which merges data from SIMS .net together with the content of a mailmerge document to produce letters, forms, reports, etc. A very simple example is shown below which uses the fields included in the example report outlined in this help sheet, to produce a paragraph of text for each child.

The mailmerge document design is as follows (which shows the manually entered text and the mailmerge fields in angled brackets, e.g. <<Legal_Surname>>):

Dear Parent/Guardian of: <<Legal_Forename>> <<Surname>>

I am writing to confirm that <<Legal_Forename>>'s Registration group this year will be <<Reg>>|

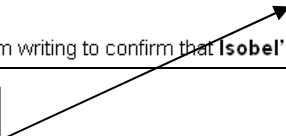
Mailmerge field in template

When the example report is run, the resulting output will look as follows (where the mailmerge fields are replaced with the actual data from SIMS .net):

Dear Parent/Guardian of: **Isobel Dambora**

I am writing to confirm that **Isobel's** Registration group this year will be **ELM**.

Replaced with
date from
SIMS .net in report



Designing a Form report (RTF) output

For more information, please see the *How to Design a Form Report (RTF) Output* help sheet (SupportNet Resource Number 10208).

Use this report output when you want to produce an RTF Word document which has the advantage that it can be read by any word processor. This format also provides more flexible control of the report and can be presented as a simple table, a form or complex report which includes data from another report for example.

When the example report is run, the resulting output looks as follows:

Example Students Lists Report						
Surname	Legal Forename	DOB	Gender	Reg	Year	
Bailey	Richard	13 Nov 1994	M	6KH	Year	6
Barker	Robert	21 Jun 1995	M	6KH	Year	6
Braithwaite	Darren	03 Dec 1994	M	6KH	Year	6
Choudhury	Nafaz	05 Jun 1995	M	6KH	Year	6
Clayton	Rosy	11 Sep 1994	F	6KH	Year	6
Friers	Marcus	29 Mar 1995	M	6KH	Year	6
Goodchild	Fiona	12 Dec 1994	F	6KH	Year	6
Hartley	Elizabeth	16 Nov 1994	F	6KH	Year	6

Designing Excel report output

For more information, please see the *How to Design an Excel Report Output* help sheet (SupportNet Resource Number 10244).

Use this option to produce a list report in Microsoft® Excel enabling the data to be further manipulated if required. This output is also useful when you wish to produce a list report that does not easily fit onto a single page.

When the example report is run, the resulting output looks as follows (as displayed in Excel's preview mode):

Example Students Lists Report						
Surname	Legal Forename	DOB	Gender	Reg	Year	
Bailey	Richard	13-Nov-94	M	6KH	Year	6
Barker	Robert	21-Jun-95	M	6KH	Year	6
Braithwaite	Darren	03-Dec-94	M	6KH	Year	6
Choudhury	Nafaz	05-Jun-95	M	6KH	Year	6
Clayton	Rosy	11-Sep-94	F	6KH	Year	6

Designing a Web Page report output

For more information, please see the *How to Design a Web Page Report Output* help sheet (SupportNet Resource Number 10206).

Use this report when you wish to create a HTML page of the report content which can be viewed using an Internet browser. This can be useful for making report information available on a web site or intranet.

When the example report is run, the resulting output looks as follows:

Surname	Legal Forename	DOB	Gender	Reg	Year
Balley	Richard	13 November 1994	M	6KH	Year 6
Barker	Robert	21 June 1995	M	6KH	Year 6
Braithwaite	Darren	03 December 1994	M	6KH	Year 6
Choudhury	Nafaz	05 June 1995	M	6KH	Year 6
Clayton	Rosy	11 September 1994	F	6KH	Year 6
Friers	Marcus	29 March 1995	M	6KH	Year 6
Goodchild	Fiona	12 December 1994	F	6KH	Year 6
Hartley	Elizabeth	16 November 1994	F	6KH	Year 6
Lough	Andrea	23 February 1995	F	6KH	Year 6

Designing a text report output

For more information, please see the *How to Design a Text Report Output* help sheet (SupportNet Resource Number 10207).

Use this option if you wish to save the content of the report as a text file (in .CSV, Tab Separated, XML or XML with Schema format). This can be useful if you want to import the resulting file into another application such as a spreadsheet.

Designing an analysis report output

This powerful analysis tool is used for statistical analysis. For information on running analysis reports, please see the *Reporting in SIMS .net* handbook. The following example shows the ethnic data from the example report being analysed:

	F	M	Total
African Asian	2	0	2
Bangladeshi	2	2	4
Black - Congolese	2	0	2
Black Caribbean	13	14	27
Chinese + any other ethnic group	0	3	3
Egyptian	0	2	2
Greek	2	2	4
Greek Cypriot	0	2	2
Hong Kong Chinese	6	13	19
Indian	27	36	63
Italian	7	9	16
Japanese	1	0	1
Kashmiri Pakistani	19	15	34
Malaysian Chinese	2	2	4
Mirpuri Pakistani	2	0	2
Other Pakistani	0	4	4

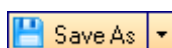
Shading: [icon] Row: Ethnicity Calculate: Total Formula: Count
Col width: [icon] Column: Gender Decimals: 0 Count: [input]

Copy to Excel Edit Score Tables Close

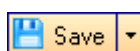
Saving the report design

Ensure that any open Microsoft Word template that you wish to associate with the report design has been saved before proceeding.

- Once the required report design has been achieved:
 - To save the report design for the first time, click the **Save As** button on the toolbar.
 - To overwrite an existing design with the changes just made, click the **Save** button on the toolbar.
 - To save an existing report with a different name, click the **Save** button down arrow and select **Save As** from the drop-down menu.

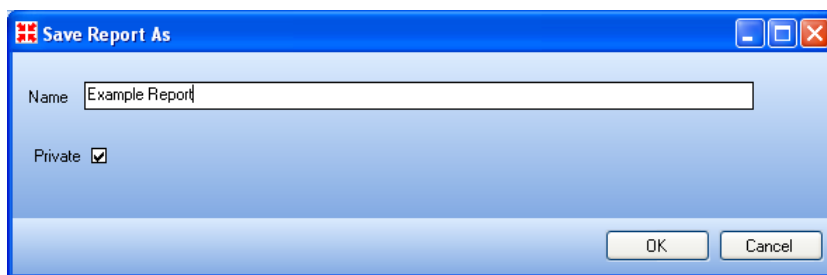


Save As button



Save button

The **Save Report As** dialog is opened.



2. Enter the required report name (up to 40 alphanumeric characters, including symbols and spaces).
3. To make report Public (i.e. accessible to other SIMS .net users with applicable Permissions), deselect the **Private** check box.
4. Click the **OK** button to save the report to the Document Management Server.

For more information, please refer to:

- *Reporting in SIMS .net* handbook.
- *How to Preview Reports* help sheet (SupportNet Resource Number 10043).
- *How to Run Reports* help sheet (SupportNet Resource Number 10045).

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS .net. Once open, click the **Handbooks** button and select the required handbook from the **Handbooks** page.

A sample selection of help sheets are available from the **Documentation Centre** in SIMS .net which can be accessed by clicking the **Documentation** button on the toolbar, then clicking the **Help Sheets** button. All available help sheets can be obtained from our SupportNet home page (<http://support.capitaes.co.uk>) by clicking the **Documentation** button, then selecting **Help Sheets** from the **Categories** drop-down list.

Training courses

For information on training courses, please contact your SIMS Support Provider.

Providing feedback on this help sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help sheet revision history

Doc. Version	Change Description	Date
1052-001	Initial Release	09/02/06
1052-002	Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text.	24/07/06
1052-003	Updated cross references to new documentation location.	05/11/08