Help Sheet

How to Design a Form Report (RTF) Output

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, Teacher Desktop User.

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

Introduction

This help sheet describes how to create a Form (RTF) report output together with associated RTF templates. It also includes the wide range of options available when creating RTF templates, including key fields, page breaks, grouping, sub reports, etc.

Rich Text Format (RTF) reports have the advantage that they can be viewed using any appropriate word processor and provide greater flexible control of the report format. Results can be presented as a simple table, a form report or can include sub-tables and report inserts.

RTF reports are similar to mailmerge reports where key fields in the selected template are replaced with data from SIMS .net when the report is run. The RTF file is then opened in whichever application you have associated with RTF files.

An example report is referenced throughout this help sheet designed as follows:

Fields:	Surname, Legal Forename, Gender, Reg Grp, Ethnicity, In LEA Care, Date of Birth.
Sort Order:	Ethnicity
Filters:	Select Year Group when the report is run
Sub Report Fields:	Contact Sub Report – Surname, Forename, Home Telephone Number.

It is assumed that you are familiar with designing simple reports. If this is not the case, please refer to the *How to Design a Simple Report* help sheet (SupportNet Resource Number *11137*).

Capita Children's Services, Franklin Court, Stannard Way,
Priory Business Park, Cardington, Bedford MK44 3JZ. Tel: 01234 838080

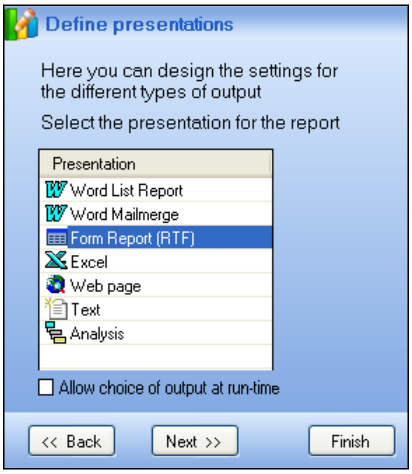
1057-003

Creating an RTF report based on an existing RTF template

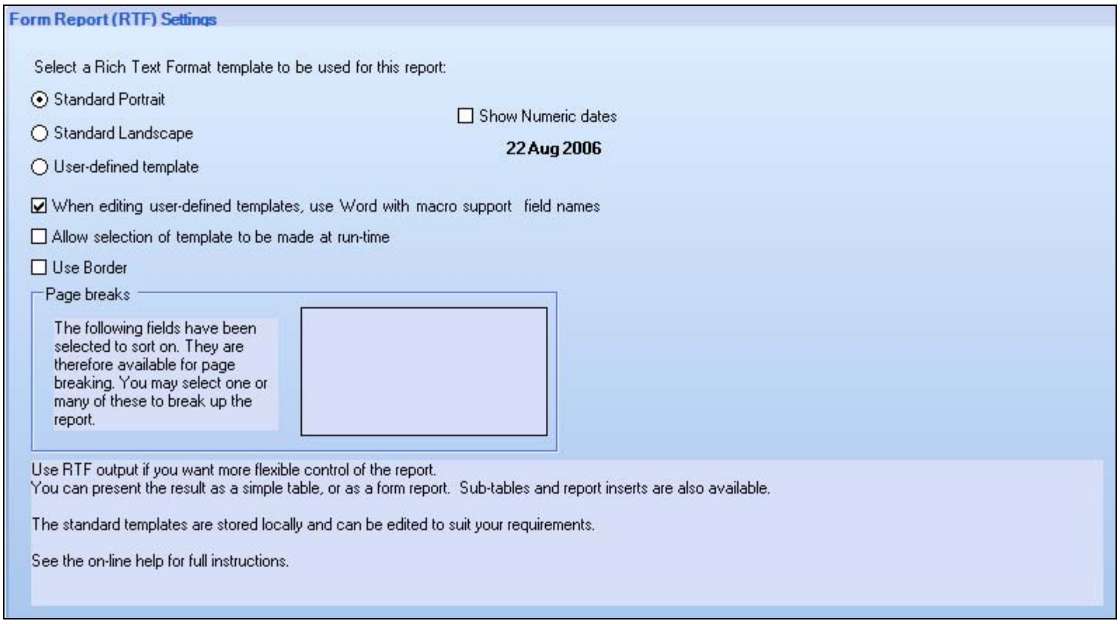
1. Select **Reports | Design** to open the **Report Designer**.

2. Click the **Create New Report** hyperlink to display the **Report Wizard** and **Report Summary**. Choose the fields to be included in the report, together with any filters and sort order. For more information on designing a report, please see the *How to Design a Simple Report* help sheet (SupportNet Resource Number *11137*).

3. Click the **Default Output** hyperlink in the **Report Summary** panel to display the **Define Presentations** page of the **Report Wizard**.



4. Select **Form Report (RTF)** from the **Presentation** list to display the **Form Report (RTF) Settings** panel.



5. Enter a title for the report in the **Report Title** field, if required.
6. Deselect the **Suppress duplicates** check box only if you want any duplicate records to appear in the report.
7. Select the required template to use for the report.

   The example report produced using the **Standard Portrait** template will produce a report on A4 paper with a portrait orientation similar to the following:

Surname	Legal Forename	Gender	Reg	Ethnicity
Hobbs	Anna	F	4SL	Black Caribbean
Jacobs	Eva	F	4SL	Black Caribbean
Raggobeer	Odee	M	4SL	Black Caribbean
Villumsen	Sebastian	M	4ES	Black Caribbean
Lee	Ting Yum	M	4SL	Honk Kong Chinese
Chand	Devi	M	4ES	Indian
Kumar	Sangeeta	F	4ES	Indian
Bellini	James	M	4SL	Italian

   The example report produced using the **Standard Landscape** template will produce a report on A4 paper with a landscape orientation similar to the following:

Surname	Legal Forename	Gender	Reg	Ethnicity
Hobbs	Anna	F	4SL	Black Caribbean
Jacobs	Eva	F	4SL	Black Caribbean
Raggobeer	Odee	M	4SL	Black Caribbean
Villumsen	Sebastian	M	4ES	Black Caribbean
Lee	Ting Yum	M	4SL	Honk Kong Chinese
Chand	Devi	M	4ES	Indian
Kumar	Sangeeta	F	4ES	Indian
Bellini	James	M	4SL	Italian

8. If you want to make use of the macro security available in Microsoft® Word (recommended), select the **When editing user-defined templates, use Word with Macro support** check box.

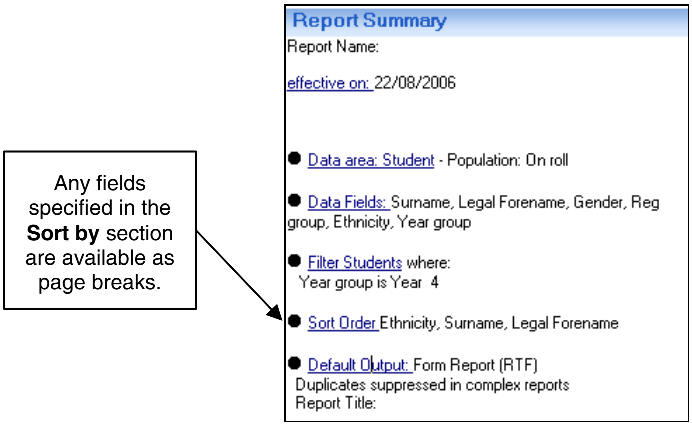
Specifying page breaks

Page breaks can be automatically inserted in the resulting report for any field that is included in the report design sort order.

NOTE: Page breaks are not available when creating user-defined reports.

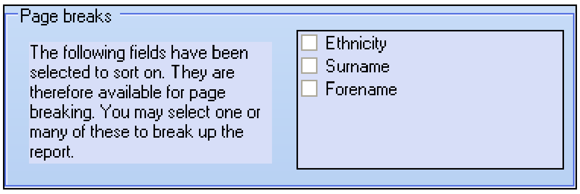
In the example report, it is therefore possible to insert a page break after Ethnicity, Surname or Legal Forename.

NOTE: Fields available for page breaks do NOT include any default sort order fields.



If **Ethnicity** is chosen, then a page break will be inserted wherever the ethnicity changes in the report.

In the **Form Report (RTF) Settings** panel, select the required check boxes to determine the page breaks.



Running and saving the report design

Before saving a report design, ensure that any attached Word templates have been saved and closed.

1. 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.

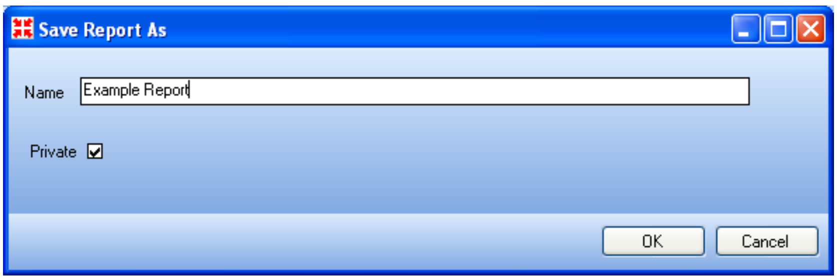
   

   Save As button

   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.

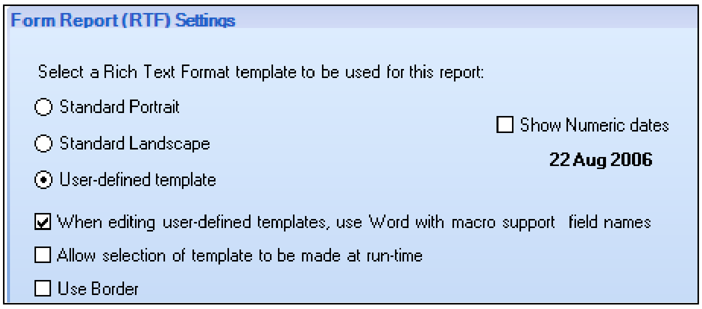
Creating a user-defined RTF template

Each RTF report is based on an RTF template which defines how the resulting report will appear. Once a user-defined RTF template is created or edited, and the report is saved, the template is attached to the report to ensure the same format and layout is achieved each time the report is run.

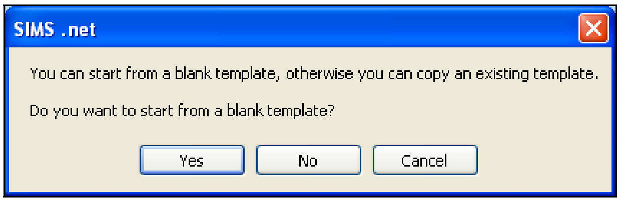
It is possible to create RTF reports based on existing RTF templates (supplied by Capita Education Services or another user, for example) or to create a new RTF template for use in creating other RTF reports.

Templates can be created that define different layouts including tabular reports, simple lists, forms, letters, etc.

1. From the **Form Report (RTF) Settings** panel, select the **User-defined template** radio button.

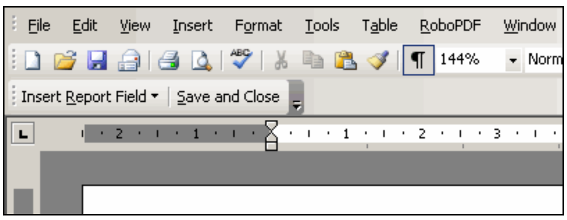


2. A message dialog prompting whether you wish to start with a blank template or existing template is displayed.



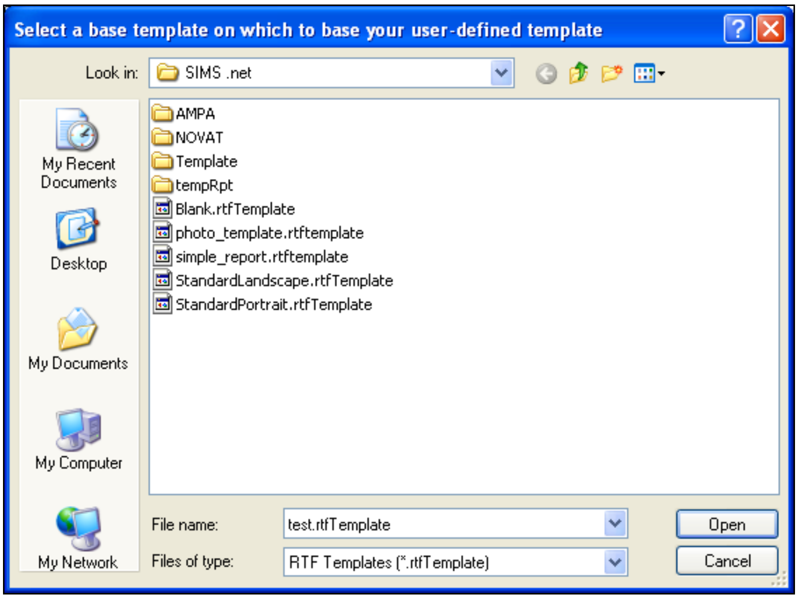
- Click the **Yes** button to start with a blank template (`Blank.rtfTemplate`). The word processor associated with RTFs will launch with two buttons beneath the main toolbar labelled **Insert Report Field** and **Save and Close**.

NOTE: Depending on your word processing macro settings, you may be prompted to Enable Macros. If this is the case, select Yes.

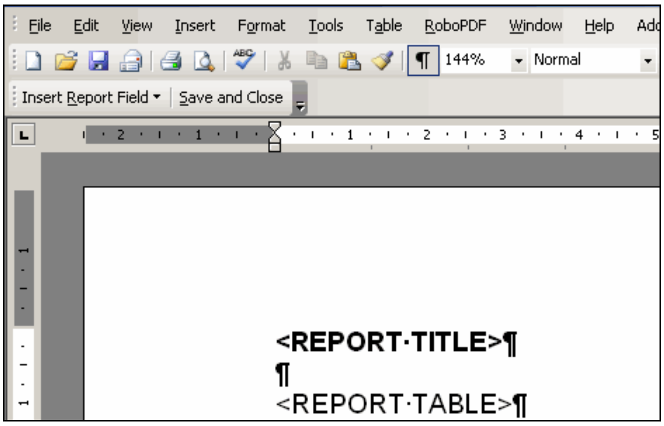


*NOTE: Whenever you make changes to a template, you MUST click the **Save and Close** button to save the current template changes and return to the SIMS .net Report Designer. Please see Saving RTF template on page 13 if you wish to save the template for re-use with other RTF reports.*

- Click the **No** button to base the new template on an existing template (including any that you have previously created).



- Select the required template, such as **StandardPortrait.rtfTemplate** or **StandardLandscape.rtfTemplate** and then click the **Open** button. The selected template will be displayed in your word processor. The following example shows the **StandardPortrait.rtfTemplate** template open in Microsoft® Word.



3. Once the required template is opened, the following options are available:
   - Insert key fields (replaced with data when the report is run)
   - Identify the start and end of a record
   - Format dates
   - Insert multiple record sets
   - Insert sub reports

Inserting key fields

Key fields are used to identify what data should be included when the report is run. On running the report, SIMS .net replaces the key fields in the template with the appropriate values from the report data.

The following key field types are available:

- System key fields (provide default system information such as report title, report date, etc.).
- Report key fields (used to insert SIMS .net data in the resulting report).
- Personal pronoun fields (used to insert his/her, he/she, etc. where appropriate).

To insert a key field, position the cursor in the required location in the template, click the **Insert Report Field** button and select the key field from the drop-down menu list of available key fields. The selected key field will appear in angle brackets, for example:

<Surname>

Alternatively, key fields can be manually entered wherever required, by typing the key field name in angle brackets noting that it must be entered exactly as shown including case sensitivity.

System key fields

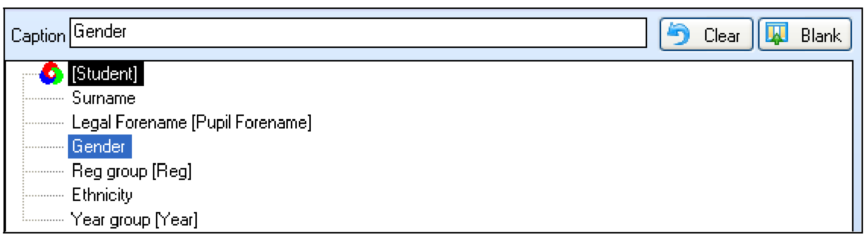
System key fields are used to insert default system information in the resulting report as follows:

<REPORT TITLE>	Replaced with the report title entered in SIMS .net.
<REPORT PRODUCING SCHOOL>	Replaced with the School Name stored in SIMS .net
<REPORT DATE>	Replaced with the date the report is run from SIMS .net.
<REPORT TIME>	Replaced with the time the report is run from SIMS .net.
<REPORT USER>	Replaced with the name of the user who is logged onto the workstation from which the report is being run.
<GROUPING>	Used to group the report. A further help sheet will be produced in the future to cover its use in more detail.
<REPORT FILTER>	Replaced with the selection filter used in the report such as Year Group.
<RECORD COUNT>	Replaced with the number of records in the report such as the number of pupil/students.
<RECORD TABLE>	A table is produced containing all the fields from the report design.
<RECORD START> <RECORD END>	These key fields are used to identify the start and end of a record displayed in the resulting report. Please see *Identifying the start and end of a record on page 8* for more information.

Report key fields

Report key fields are used to insert SIMS .net data in the resulting report and can be inserted by clicking the **Insert Report Field** button on the word processor toolbar.

To manually enter a report key field, type the **Caption** used for the applicable field in the report design within angle brackets in the required location of the template. For example, to insert the **Gender** field in the template, enter **<Gender>**.



***IMPORTANT NOTE**: Caption names are case sensitive and must be entered exactly as they are displayed in the **Caption** field shown in the previous graphic.*

The same report key field can be inserted as many times as required.

*TIP: There may be some circumstances (such as Surname and Forename, phone numbers) when it can be useful to edit the caption in order to help identify the key field in the template. This is particularly useful when both pupil/students and contacts are included in the report. The Surname key fields could be renamed to **Pupil Surname** and **Contact Surname** accordingly.*

Personal pronoun fields

Used in combination with report key fields, personal pronoun fields ensure that the correct male/female variations are used within the report such as <his/her>. They will be replaced with the appropriate variation according to the gender of the pupil/student or person included in the template, based on their recorded gender.

The following options are available and can either be inserted by clicking the **Insert Report Field** button on the word processor toolbar or enter the key field exactly as shown in the following list:

<he/she>

<He/She>

<his/her>

<His/Her>

<him/her>

<his/hers>

Inserting the following key fields:

> **<Legal Forename>** has shown outstanding commitment to **<his/her>** learning this term. **<He/She>** has also achieved 100% attendance.¶

will return:

> **Sergei** has shown outstanding commitment to **his** learning this term. **He** has also achieved 100% attendance.¶

Identifying the start and end of a record

It is important to identify the start and end of each record to ensure that the report does not just contain one record when produced.

Insert **<RECORD START>** to identify the start of the record and **<RECORD END>** to identify the end.

Using the example report, inserting the following:

> <RECORD START><Surname> → <Legal Forename> → <Gender> → <Reg> → <Ethnicity>¶
> <RECORD END>¶

will return:

Hobbs	Anna	F	4SL	Black Caribbean¶
Jacobs	Eva	F	4SL	Black Caribbean¶
Raggobeer	Odee	M	4SL	Black Caribbean¶

NOTE: Ensure that you have inserted the required formatting, such as tab marks and have entered a paragraph mark at the end of the field list if you want each record to start on a new line. Further paragraph marks can be added if you want to increase the spacing. If you want each pupil/student to appear on a new page, ensure that you insert a page break then add <RECORD END> on the new page.

When producing simple lists, it is advisable to use tables to ensure correct alignment of the results. When using tables, care must be taking where the <RECORD START> and <RECORD END> fields are inserted. The following examples show the results that will be obtained:

Using the example report, inserting <RECORD START> before the table and <RECORD END> after the table as follows:

<RECORD START>

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
<Surname>	<Legal Forename>	<Gender>	<Reg>	<Ethnicity>

<RECORD END>

will produce a separate table for each record.

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
Hobbs	Anna	F	4SL	Black Caribbean

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
Jacobs	Eva	F	4SL	Black Caribbean

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
Raggobeer	Odee	M	4SL	Black Caribbean

To produce a single table, you must insert <RECORD START> before the first field in the first column of the table, then insert <RECORD END> in a separate row below the row of fields as shown in the following example:

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
<RECORD START><Surname>	<Legal Forename>	<Gender>	<Reg>	<Ethnicity>
<RECORD END>				

You **must** then format the <RECORD END> row to remove all the side and bottom borders of the table row as shown in the following example:

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
<RECORD START><Surname>	<Legal Forename>	<Gender>	<Reg>	<Ethnicity>
<RECORD END>				

This will produce the following report:

Surname	**Forename**	**Gender**	**Reg Group**	**Ethnicity**
Hobbs	Anna	F	4SL	Black Caribbean
Jacobs	Eva	F	4SL	Black Caribbean
Raggobeer	Odee	M	4SL	Black Caribbean
Villumsen	Sebastian	M	4ES	Black Caribbean
Lee	Ting Yum	M	4SL	Hong Kong Chinese
Chand	Devi	M	4ES	Indian
Kumar	Sangeeta	F	4ES	Indian

Formatting key fields

It is possible to format key fields in the same way as the text within the template, such as bold, italics, underline, etc. Highlight the key field and apply the formatting in the usual way. The following additional options are available:

Formatting date fields

Date fields are normally presented in **dd MMM yyyy** format. If required, the format of the date can be changed by inserting the appropriate date string after the date field.

Inserting the following key fields:

<Surname> → <Legal·Forename> → <DOB>¶

would return by default:

```
Hobbs → Anna → 23·Jun·1997¶
```

To change the format, enter the required format within the angle brackets of the date key field as shown in the following example:

```
<Surname> → <Legal·Forename> → <DOB·dd/MM/yy>¶
```

would return:

```
Hobbs → Anna → 23/06/97¶
```

---

*NOTE: The date format options are case sensitive. Pay particular attention to **M** for months and **m** for minutes. You can also add various date dividers such as **–** or **/** as required.*

The following date formatting options are available:

Formatting Option	**Example**
y = Year	**yy** returns **06** **yyyy** returns **2006**
M = Month	**M** returns **1** **MM** returns **01** **MMM** returns **Jan** **MMMM** returns **January**
d = Day	**d** returns **1** **dd** returns **01** **ddd** returns **Mon** **dddd** returns **Monday**

Formatting Option	**Example**
h = Hours	**hh** returns **01**
M = Minutes	**mm** returns **59**
S = Seconds	**ss** returns **59**
	hh:mm:ss returns **01:59:59**

NOTE: To avoid zeros being returned, it is advisable only to use the time format where you know that time data exists.

Formatting logical fields

By default, any logical field included in the report design returns a true or false value represented with a **T** for true, and **F** for false.

It is possible to change these values by adding any two replacement values in the angle brackets, e.g.
<In LEA Care (In Care/Not In Care)> or
<Correspondence (Receives Correspondence/Does not receive Correspondence).

This can be used to make the logical field data more meaningful in the resulting report.

Inserting the following:

```
<RECORD·START><Surname> → <Legal·Forename> → <In·LEA·Care·(In·Care/Not·In·Care)>¶
<RECORD·END>¶
```

will return:

Shariff	Ali	Not·In·Care¶
Chang	Xhang	Not·In·Care¶
Yip	Sang	Not·In·Care¶
Khan	Mina	Not·In·Care¶
De·Souza	Luciana	In·Care¶
Jhanji	Feisal	Not·In·Care¶

Re-sizing photos

Depending on the layout of the report, it may be necessary to resize photographs to ensure they fit neatly on the page. Photos can either be increased or decreasing by entering the required size based on a percentage of its original size in the photo key field, e.g. **<Photo (50%)>**.or **<Photo (120%)>**.

Before resize

<Legal·Forename>·<Surname>¶
<Photo>¶

Sergei·Antas¶

¶

After resize

<Legal·Forename>·<Surname>¶
<Photo·(50%)>¶

Sergei·Antas¶

¶

Inserting multiple record sets

There may be occasions when you want to produce a report that includes multiple record sets such as a list of all the contacts for a particular pupil/student or the classes they attend.

To insert multiple records sets, you must add a table to the template and insert the required report key fields in the columns (which must be included in the report design).

Inserting the following:

<RECORD·START><Surname>·<Legal·Forename> → <Gender> → <In·LEA·Care·(In·Care/Not·In·Care)>¶
Contacts:¶

Surname¤	**Forename¤**	**Home·Telephone¤**
<Surname>¤	<Forename>¤	<Main·Home·Telephone>¤

<RECORD·END>¶

will return:

Katumbe Namuli F Not In Care
Contacts:

Surname	**Forename**	**Home Telephone**
Katumbe	Chiamaka	01361 626277
Katumbe	Abeni	01361 626277

Allim Farah F Not In Care
Contacts:

Surname	**Forename**	**Home Telephone**
Allim	Kate	878243
Allim	Sukhvir	878243

Miah Ali M Not In Care

NOTE: Only one multiple record set can be inserted per report. If more than one is required, this can be achieved by inserting sub reports.

Inserting sub reports

To create more complex reports, it is possible to insert one or more reports into another. This is also useful where you wish to insert more than one multiple record set.

An example is the Data Collection Sheet supplied with the SIMS .net Pre-defined reports. This contains a multiple record set of all the contacts for a pupil/student, together with a sub report which lists any medical conditions.

NOTE: The sub report must have been created using an RTF template and must have the same Focus as the main report, e.g. they must both be based on the Student Focus.

Inserting sub reports is achieved by entering **<REPORT INSERT report name>** where **report name** is the name of the report you wish to insert (the report name is not case sensitive), e.g.

<REPORT INSERT Contactssubreport>

Using the same example used for inserting multiple record sets, a sub report could be added to list the medical conditions of each child in the report. This is achieved by creating a simple report that lists the medical conditions and then inserting that report into the main report.

IMPORTANT NOTE: It is important not to delete a sub report design once it has been included in another report! You must also ensure that if you export the main report, you must also include the sub report in the export file to ensure that the reports work correctly.

If for example, the medical condition report is filtered on medical condition and the main report is filtered on Year Group, then the medical report will also be filtered on Year Group.

The following example shows the report named **Medical Conditions Sub Report Insert** (which contains fields for Dietary Need and Emergency Consent) has been added as a sub report:

Inserting the following:

<RECORD·START><Surname>·<Legal·Forename> → <Gender> → <In·LEA·Care·(In·Care/Not·In·Care)>¶
Contacts:¶

Surname¤	**Forename¤**	**Home·Telephone¤**
<Surname>¤	<Forename>¤	<Main·Home·Telephone>¤

¶
<REPORT·INSERT·Medical·Conditions·sub·report·insert>¶
<RECORD·END>¶

will return:

Tsang Siu Heng M Not In Care
Contacts:

Surname	**Forename**	**Home Telephone**
Tsang	JENNIFER	664365
Tsang	Kevin	
Tsang	Sue	

Dietary needs	**Emergency consent**
Gluten free	N

NOTE: The use of sub reports may be necessarily slow, as each inserted report will have to be executed once for every item in the main report.

Using RTF to produce simple list reports

It is possible to use RTF templates to easily produce simple list reports. If you want to produce a tabular, list report containing all the fields included in the report design, simply enter **<REPORT TABLE>** wherever you want the list to appear in the template.

NOTE: Any other key fields inserted in the template will be ignored.

Inserting the following:

<REPORT·TABLE>¶

will return:

Surname	Legal Forename	Gender	Reg	Ethnicity
Hobbs	Anna	F	4SL	Black Caribbean
Jacobs	Eva	F	4SL	Black Caribbean
Raggobeer	Odee	M	4SL	Black Caribbean
Villumsen	Sebastian	M	4ES	Black Caribbean

The system will try 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 will need to be designed with fixed column widths.

Grouping simple list report

It is possible to group a simple list report by any value included in sort within the report design. This will produce a tabular list on a separate page for each item in the group. It is achieved by entering the sort field name (case sensitive) within the Group By field, e.g. <GROUP BY Ethnicity>.

Inserting the following:

<GROUP·BY·Ethnicity><REPORT·TABLE>¶

will return:

Ethnicity:·Black·Caribbean¶

¶

Surname¤	Legal·Forename¤	Gender¤	Reg¤¤
Hobbs¤	Anna¤	F¤	4SL¤¤
Jacobs¤	Eva¤	F¤	4SL¤¤
Raggobeer¤	Odee¤	M¤	4SL¤¤
Villumsen¤	Sebastian¤	M¤	4ES¤¤

¶

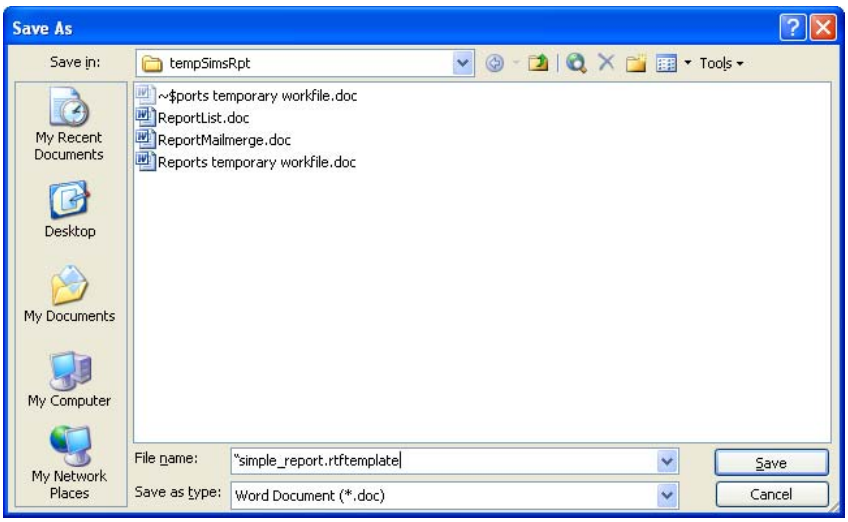
Page Break

A page break is inserted after each new group is found.

Saving RTF templates for re-use

Once the required report design has been achieved, if you wish to save the template with the report design, simply click the **Save and Close** button on the word processor toolbar. This attaches the new template to the report design and when run, the report will be produced based on the layout defined in the template.

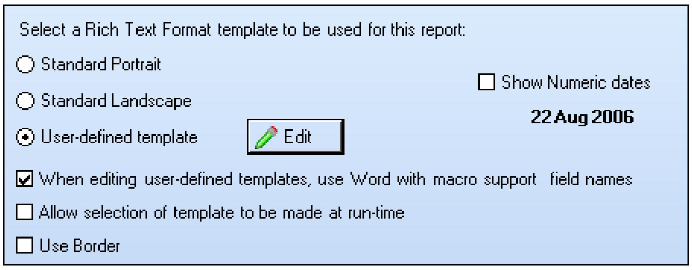
1. If you want to use the newly designed RTF template to create or run other RTF reports, select **File | Save As** from the word processor menu bar to open the **Save As** dialog.



2. Enter the name for the RTF template ensuring that it has a file extension of `.rtftemplate` and that the file name is entered in quotes, e.g. `"simple_report.rtftemplate"`.
3. Click the **Save** button to save the RTF template.

Editing existing user-defined RTF templates

If an RTF template is already attached to the report design, then an **Edit** button will be displayed adjacent to the **User-define template** radio button.

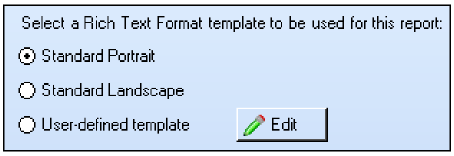


1. Click the **Edit** button to open the existing template.
2. Edit the template as required and then click the **Save and Close** button on the word processor toolbar to save the changes.

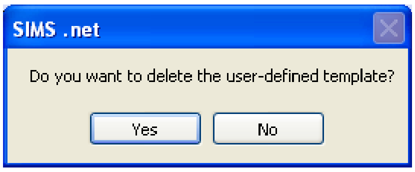
Please see the previous section if you wish to save the template for use with other RTF reports.

Deleting a user-defined RTF template

1. If you want to delete an attached user-defined template, simply select the **Standard Portrait** or **Standard Landscape** radio buttons.



2. A message dialog will appear asking if you want to delete the user-defined template.



3. Click the **Yes** button.

For more information, please refer to:

- *Reporting in SIMS .net* handbook.
- *How to Design a Simple Report* help sheet (SupportNet Resource Number *11137*).
- *How to Preview Reports* help she (SupportNet Resource Number *11138*).
- *How to Run Reports* help sheet (SupportNet Resource Number *11125*).
- *How to Save or Delete Reports* help sheet (SupportNet Resource Number *11136*).

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 Cente** 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
1057-001	Initial Release	13/02/06
1057-002	Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text.	22/08/06
1057-003	Updated cross references with new documentation location.	05/11/08