SIMS

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Designing Reports in SIMS

This Quick Reference Sheet demonstrates the flexibility available when designing reports in SIMS. For a detailed explanation of the steps involved with this process and examples that assist with your report design, please refer to the *Designing and Running Reports* handbook, which can be accessed by clicking the **Documentation** button on the SIMS **Home Page**.

Permissions

The functionality, fields and data available in SIMS are dependent on the permissions assigned to you in System Manager.

The Report Designer

Three options are available via **Reports | Design Report**. The first and most complex of these is the **Create a new report** option.

You can also **Open an existing report** for editing purposes or **Import a report**, e.g. a report supplied by Capita SIMS, your LA or another school, which can then be edited and saved with a different name.

> **Report Designer**
> **Welcome to the SIMS.net report designer**
> I would like to ...
> - Create a new report
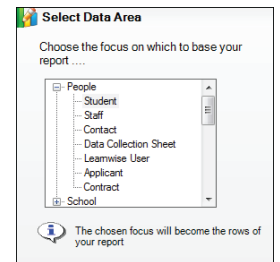> - Open an existing report
> - Import a report
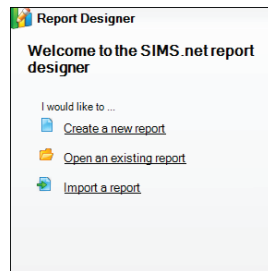
The **Report Designer** guides you through the design process.

Previous stages can be revisited at any point by clicking the **Back** button until you reach the required screen.

Selecting the Data Area (Report Focus)

The **Data Area** is the focus on which your report is based, e.g. **People**, **School**, etc. Depending on the focus you have selected and the permissions assigned to you, the **Data Area** can be refined by selecting a subset of that area. This is called the **Population**. For example, if the report is based on Student information, the Data Area Population can be refined to **On roll**, **Leavers**, **All students**, etc.

> **Select Data Area**
> Choose the focus on which to base your report ....
> - People
>   - Student
>   - Staff
>   - Contact
>   - Data Collection Sheet
>   - Learnwise User
>   - Applicant
>   - Contract
> - School
> The chosen focus will become the rows of your report

Selecting the Data Fields (Report Columns)

Selecting data fields enables you to specify the items of information required for the report and the order in which the information will be displayed. These items are shown on the report as columns. It is also possible to change the default name for each column, if required.

Report Designer panel

Use the **Next** and **Back** buttons to display the various options of the report designer, i.e. **Select Data Area**, **Refine Data Area**, **Select Data Fields**, **Apply Filter**, **Define Sort Order**, **Specify effective date** and **Define presentations**.

Clicking the **Load from an existing report** hyperlink enables you to load data fields (columns) from an existing report.

Select the required data fields (columns) from the left-hand panel by double-clicking the item or by highlighting the item and clicking the **Right Arrow** button.

Report Summary

The **Report Summary** is updated each time you make a data selection and enables you to revisit any area of the report design by clicking the relevant hyperlink.

Your chosen focus (**Data Area**) for the report design is shown here. It is not possible to change the focus for the current report design once it has been selected.

Clear button

Removes all previous selections, enabling you to choose a new set of data fields.

Blank button

Adds a blank column to the bottom of the selected data fields.

Up and **Down** arrows enable you to change the order in which the columns appear in your report.

Caption field

Displays the highlighted data field (column), enabling you to edit the column title, if required. The new column title is then shown in square brackets adjacent to the data field name.

Deselect the data fields (columns) by double-clicking the item or by highlighting the item then clicking the **Left Arrow** button.
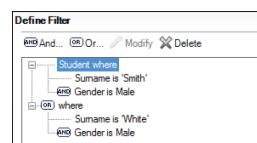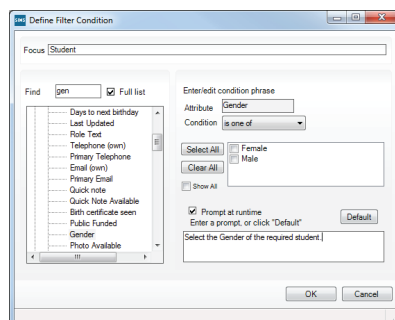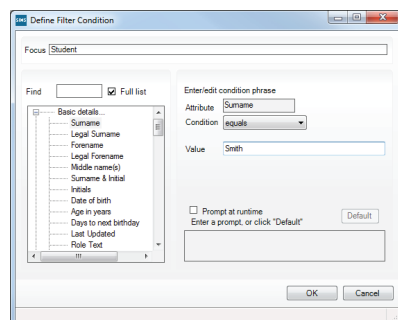
Additional Filter Conditions

For example, double-clicking **Student Conduct Information [Count]** within the selected fields area displays the filter option **Related Student conduct Information** (located at the bottom of the panel). This can be used to split a Conduct report into Behaviour and Achievement types.

*NOTE: It is possible to report on data fields outside of the report focus, e.g. in this example you could include **Contacts** or **Exclusions**. These are known as subreports ( ).*

Applying Filter Conditions

Report filters are used to restrict the records returned in the report. Clicking the **New** button in the **Define Filter** panel displays the **Define Filter Condition** dialog. Each filter condition consists of an **Attribute**, e.g. `Surname`, a **Condition**, e.g. `equals`, and a **Value**, e.g. `Smith`. These three items form the condition phrase, e.g. `Surname equals Smith`. Collectively, these are referred to as clauses. Many different clauses can be added (if required) and joined together using '**And**', '**Or**' or a combination of both, e.g. `Surname equals Smith` **AND** `Gender equals Male` **OR** `Surname equals White` **AND** `Gender equals Male`.

A prompt (displayed at run-time) can be entered on the **Define Filter Condition** dialog for the person running the report, e.g. "`Select the gender of the required pupil`". Select the **Prompt at runtime** check box then enter the required text.

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Defining the Sort Order

The rows of your report are displayed in the default sort order, e.g. a Student focus report is sorted in Surname order. However, it is possible to specify an alternative sort order by selecting from the navigation tree. The method of selection is similar to that of selecting data fields. The items you can select are determined by the Data Area (focus) selected earlier in the process.

Selecting the Report Presentation
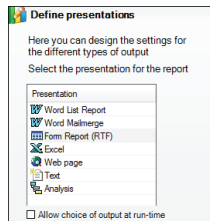
Defining the Presentation Output

To enable the person running the report to choose the output, select the **Allow choice of output at run-time** check box.

Alternatively, if you wish to force the report to be generated in a specific output, select the required output type from the **Presentation** list.

Defining Word List Reports

The design of the report is determined by a predefined Microsoft® Word template that contains relevant text, formatting and mail merge fields, which will be replaced with data from your database when the report is run.

Default templates that can be edited are provided. Select from **Standard Portrait**, **Standard Landscape** or **User-defined template**.

Dietary Needs

Forename	Surname	Reg	Dietary Needs
Jimmy	Abbey	8A	Artificial colouring allergy, Gluten free
Claire	Abbot	9A	Vegetarian
Clarissa	Abbot	11A	
Hannah	Abbot	7B	No dairy produce
James	Abbot	10C	
Susan	Abbot	8B	No nuts of any type/quantity
Mohamed	Abdelkoder	P	
Benjamin	Able	11A	Artificial colouring allergy
Frederik	Abu-Koash	11C	
Marc	Ackroyd	10B	

Defining Word Mailmerge Reports

Click the **New** button to open Microsoft® Word and use the report fields, that are available via a toolbar in Word, to create the document. Saving the document and closing Word (immediately) associates the document with the report design.

Defining Form Reports (RTF)

Provides flexible control for a report, enabling it to be presented as a simple table or as a form report. These reports are produced using Word's Mailmerge facility.

Standard templates are available, which can be edited. Select from **Standard Portrait**, **Standard Landscape** or **User-defined template**. Page breaks can be added to Form reports.

Forename	Surname	Reg	Dietary Needs
Jimmy	Abbey	8A	Artificial colouring allergy, Gluten free
Claire	Abbot	9A	Vegetarian
Clarissa	Abbot	11A	
Hannah	Abbot	7B	No dairy produce
James	Abbot	10C	
Susan	Abbot	8B	No nuts of any type/quantity
Mohamed	Abdelkoder	P	
Benjamin	Able	11A	Artificial colouring allergy
Frederik	Abu-Koash	11C	
Marc	Ackroyd	10B	

Defining Excel Reports

Particularly suitable for reports, as it produces a list report in Microsoft® Excel, where the data can be further manipulated. Select from **Standard Portrait**, **Standard Landscape** or **Report Template**. It is also possible to define the number of records/rows that will be grouped and separated by a horizontal line to specify the number of columns that will be repeated on printed continuous pages and to open in Excel's print preview.

Data in the report can be listed in groups, e.g. by year, and a record count can be inserted in the top left-hand side of the report.

Dietary Needs

Forename	Surname	Reg	Dietary Needs
Jimmy	Abbey	8A	Artificial colouring allergy, Gluten free
Claire	Abbot	9A	Vegetarian
Clarissa	Abbot	11A	
Hannah	Abbot	7B	No dairy produce
James	Abbot	10C	
Susan	Abbot	8B	No nuts of any type/quantity
Mohamed	Abdelkoder	P	
Benjamin	Able	11A	Artificial colouring allergy
Frederik	Abu-Koash	11C	
Marc			

Defining Web Page Reports (HTML)

Presented in tabular format directly in your Internet browser. The location of the web page can be specified and there is also the option to view the result in the browser when a web page is created.

Defining Text Reports

Running a Text report exports the report data to a text file. Enter a file name and specify the file format to be used.
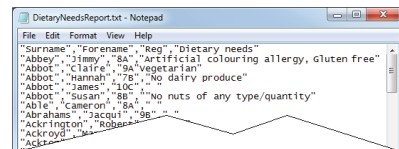
Defining Analysis Reports

This option enables the report data to be used for further analysis within SIMS. The report data is presented in a tabular display in the **SIMS Analysis** window, where various options are available, e.g. **Shading** to enphasise data, **column width**, number of decimal places, etc.

Saving the Report Design

Report designs are saved automatically in the **My Reports** folder and the Associated **Focus** folder, e.g. **Student**, which are stored in the Document Management Server (DMS). These designs are available for viewing only by the creator, unless they have been made public at the time of saving by deselecting the **Private** check box.

Click the **Save my report** button to display the **Save Report As** dialog.
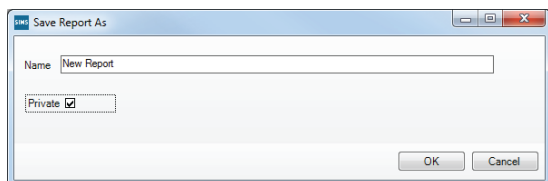
Separate elements of the saved report design, e.g. selected data fields (columns), can be used in the design of other reports, eliminating the need to reselect the information. This is achieved by clicking the **Load from existing report** hyperlink (where available) during the report design process.

A report saved as **Private** can subsequently be made **Public** by copying it to the appropriate **Focus** or **Category** folder, enabling other users to access the report.

Categories

Report categories can be created to enable the organisation of reports. For example, you may wish to create a category for each department in the school, e.g. **Science**, **Maths**, **English**, etc. To create a new category:

1. Select **Reports | Export** to display the **Select reports to export** dialog.
2. Select **Tools | Categories** to display the **Report Category** dialog.
3. Click the **New** button then enter a **Name** for the category.
4. Click the **OK** button on each dialog to save the category.

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