Student List Reports

Producing a General Student or Class List Report

Each Student List report provides you with a list of pupil/students, sorted initially by surname. The following Student List reports are available in SIMS via **Reports | Student List**:

- The General Student List displays every pupil/student currently on-roll at your school.
- The Class List provides a list for every class in the current pastoral structure, for pupil/students who are currently on-roll.
- The Registration Group List provides a list for every registration group in the current pastoral structure, for pupil/students who are currently on-roll.

Once a Student List report is generated, the report structure can be altered and saved, enabling you to create a structure that suits the requirements of your school. For example, you may want to build on the default report layout to include additional report columns, pupil/student filters, etc. and to change the default sort order. The method of manipulating and saving the report structure is the same for all three reports.

Running the General Student List Report

The General Student List report provides a basic pupil/student report, displaying all pupil/students on-roll today and accepted applicants, regardless of their enrolment status (i.e. guest pupil/students and dual registration pupil/students are included in the report output). The effective date of the report can be changed, so that you can view the report output as it would be on a different date.

This report can be run as a report in its own right or used as a template from which you can create and save your own report design. If you amend a report and then save it, the original SIMS report design is retained but you are invited to save your changes with a different report name.

The report initially displays each pupil/student's **Full Name** (surname and forename), **Gender**, **Date of Birth**, **Year Group** and **Reg Group**, sorted alphabetically by surname and forename.

To run the report, select **Reports | Student List | General Student List** to display the **General Student List as of <Today's Date>** page.

The output of the report is displayed on screen, based on the data stored in your system on today's date. The structure of the report can now be amended, as can the **Effective Date** (the date for which the report is run). Filters can also be applied and the sort order can now be set. Once any such amendments have been made, the report can be saved as a user-defined report, without overwriting the original report provided by SIMS. The format and layout of the report can also be changed.

*NOTE: This report is also available from within the Class List report and the Registration Group List report, by selecting its name from the **List** drop-down list.*

Specifying a Sort Order for the Student List Report

Student List reports are displayed alphabetically by pupil/student name but this sort order can be amended, if required. A range of fields is available from which you can select the sort order. The field(s) selected as the sort order do not need to be displayed as columns on the report output.

IMPORTANT NOTE: *If you make changes to a Student List report, you must save the report to retain its format and structure.*

To change the sort order, with a Student List report displayed, click the **Sort** button to display the **Student Sorting** dialog.

When a sort order is set, it is displayed in the panel at the top of the screen. This panel remains blank until a sort order is selected.

The **Sort Types** list displays the sort fields available for selection. Additional fields are also available and can be viewed in the **Other Fields** list on the right-hand side of the page by clicking the **Other Fields** option in the **Sort Types** list.

To select a sort order for the report, select either the **Ascending** or **Descending** radio button to indicate whether the report content will be sorted on the selected column in alphabetical/numerical order, or reverse order.

Double-click the required sorting option in the **Sort Types** to indicate the field on which you want to sort the report. Alternatively, click **Other Fields** in the **Sort Types** list and double-click an item in the **Other Fields** list.

Multiple sort criteria can be applied to a report. For example, you may want to sort the report by gender and then by name, to achieve a report that lists boys and girls, sorted alphabetically for each gender.

To apply an additional sort criteria, double-click the required field in the **Sort Types** or **Other Fields** list. The second sort criteria is now displayed in the panel at the top of the dialog. Repeat this process to apply additional sort criteria.

Applying a Filter to the General Student List Report

One or more filters can be applied to a General Student List report, enabling you to view only the pupil/students who meet the specified criteria. For example, from the full list of pupil/students currently on-roll, you may want to view only those in a specific registration group or those who study a particular subject. Multiple filters can be set, enabling you to report on students in year 11 who study Biology, for example. The field(s) selected as a filter do not need to be displayed as columns on the report output.

For a detailed explanation of the filters available, please refer to the *Producing Student List Reports* chapter in the *Producing Student List, Student Analysis and Timetable Reports* handbook, which can be accessed by clicking the **Documentation** button on the SIMS **Home Page**.

NOTE: When you save a copy of the report after setting a filter, the filter is saved as part of the report definition.

1. Click the **Filter** button to display the **Student Filter** dialog.

   When a filter is set, it is displayed in the panel at the top of the screen.

   The **Filter Types** list displays the criteria available for selection.

2. Additional criteria is also available and can be viewed in the **Other Fields** list on the right-hand side of the page by clicking the **Other Fields** option in the **Filter Types** list.

3. To set a filter for the report, double-click the required filter in the **Filter Types** list. Alternatively, click **Other Fields** in the **Filter Types** list and double-click an item in the **Other Fields** list.

4. Click the **OK** button to return to the report output.
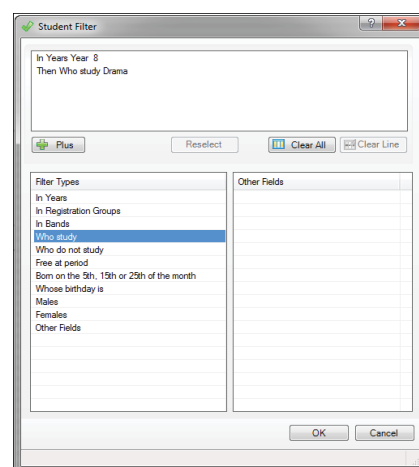
The selected filter is displayed in the panel at the top of the screen. Additional filters can be added to further refine the report output. A number of filters can be applied to a General Student List report.

Selecting the Data Area

On the right-hand side of the report list page, a number of additional options are available from the **Select Data Area**. These can be dragged onto the report and incorporated as columns.

The default of **Standard** displays a variety of pupil/student related **Basic Details** options.

Select **Academic** to display **Curriculum** related options for inclusion in the list report.

Changing the Pupil/Student Display

When the General Student List report is displayed, all pupil/students are selected by default. This is indicated by their names displayed in black text. Click a pupil/student's name to change the text to grey, indicating that they have been deselected. To change the display, click the **View** button and select from the following options:

- **Show All** - restores the view to all pupil/students.
- **Hide Selected** - hides all selected pupil/students.
- **Show Selected Only** - shows all selected pupil/students.

Specifying Additional Report Settings

The dates on which reports are based can be changed, so you can view retrospective data as well as future data. The default data view shows how the data looks today.

1. Click the **Settings** button to display the **Settings** dialog.

2. Select the **Effective Date** from the Calendar to display all on-roll pupil/students on that date.

3. If you want to specify a **Membership Date**, select the check box.

4. Enter the **Membership Date** or click the **Calendar** button and select the required date.

5. Click the **OK** button.

Producing a Photo List Report

1. Click the **Photo** button to display the **Photo Lists Setup** dialog.

   A default **Title** is provided but this can be edited, if required.

2. In the **Layout** panel, select the number of photographs to be displayed on each line of the report by selecting the appropriate radio button. The **Auto** radio button selects a 'best fit' value, based on the size of the photographs. The total number of **Students** in the report output is displayed at the bottom of the **Layout** panel.

3. In the **Captions** panel, select the radio button that corresponds with the format you want to use for pupil/student names.

4. In the **Lists** panel, select the radio button that corresponds to how you want to present the report output.

5. Click the **OK** button.

Printing and Exporting the Report Output

Click the **Print Options** button to specify any printing parameters. Alternatively, click the **Export** button and specify the preferred layout and output options before saving or exporting the report.

Running a Class List Report

The Class List report is similar to the General Student List Report but enables you to produce a list of pupil/students (both on-roll and accepted applicants) where the class is the focus. An effective date can be specified, enabling the report to be generated, viewed, printed and exported before the start of term, for example.

Navigation between the classes included in the report is achieved using the **Move First**, **Previous**, **Next** and **Move Last** buttons on the toolbar. If you amend a report and then save it, the original SIMS report design is retained but you are invited to save your changes with a different report name.

The report initially displays each pupil/student's **Full Name** (surname and forename), **Gender**, **Date of Birth**, **Year Group** and **Reg Group**, sorted alphabetically by surname and forename.

Select **Reports | Student List | Class List** to display the **Select classes** dialog.

The **Effective Date** is the date on which you want to report class memberships. All classes on the curriculum plan for the current academic year are displayed on the right-hand side of the dialog. Multiple filters can be applied to the **Select classes** dialog, if required.

The choice of filters is determined by selecting the relevant radio button:

- **Classes** - displays all classes on your curriculum plan.
- **All Staff (Curriculum)** - displays all classes on your curriculum plan, together with the name of the main class supervisor.
- **All Staff (Timetable)** - displays all classes on your curriculum plan. Multiple lines are displayed if there is more than one class teacher associated with a class.

Additional filters can be selected by double-clicking any required **Selection Types**. Each class has an associated check box and all of the class check boxes are selected by default. Deselect any classes that you do not want to be displayed in the report.

It is also possible to generate a report based on a subset of the available classes by selecting the **Preview Classes that have been selected for Export/Print** check box.

NOTE: To produce a report for a single class, double-click its name in the panel on the right-hand side of the page.

Once the appropriate classes have been selected, click the **OK** button to display the **Class List Report** page. The structure of the report can now be amended, if required. A sort order can also be set. Once all amendments have been made, the report can be saved as a user-defined report, without overwriting the original report provided by Capita SIMS. The format and layout of the report can also be changed, if required.

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