

# 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**.

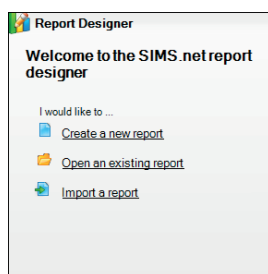
## Permissions

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 SIMS, your LA or another school, which can then be edited and saved with a different name.

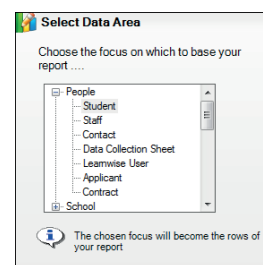


The **Report Designer** guides you through the design process.

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.



## 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.

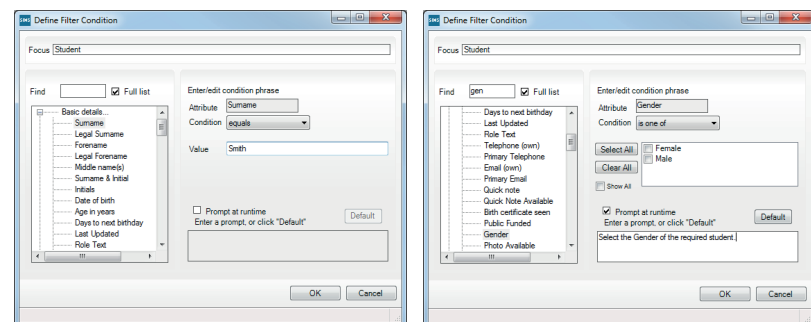
Deselect the data fields (columns) by double-clicking the item or by highlighting the item then clicking the **Left Arrow** button.

**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.

## Defining the Sort Order

## Selecting the Report Presentation

**Define presentations**

Here you can design the settings for the different types of output

Select the presentation for the report

Presentation

- Word List Report
- Word Malingerer
- Form Report (RTF)
- Excel
- Web page
- Text
- Analysis

☐ Allow choice of output at run-time

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

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	

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	Abbott	5A	Artificial colouring allergy, Gluten free
Claire	Abbott	9A	Vegetarian
Clarissa	Abbott	11A	
Hannah	Abbott	7B	No dairy produce
James	Abbott	10C	
Susan	Abbott	6B	No nuts of any type/quantity
Mohamed	Abdelkder	P	
Benjamin	Abble	11A	Artificial colouring allergy
Fredrik	Abu-Koosh	11C	
Marc	Acknowled	10B	

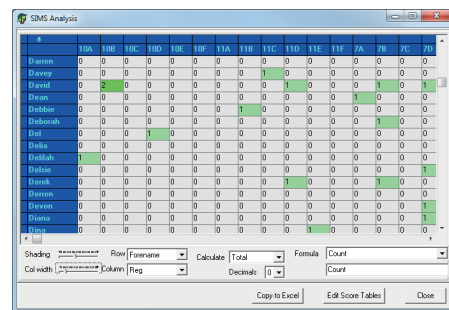
Dietary Needs			
Forename	Surname	Reg	Dietary Needs
Jimmy	Abbey	6A	Artificial colouring allergy, Gluten free
Claire	Abbot	9A	Vegetarian
Clarissa	Abbot	11A	
Hannah	Abbot	7B	No dairy produce
James	Abbot	10C	
Susan	Abbot	6B	No nuts of any type/quantity
Mohamed	Abdelkader	P	
Benjamin	Abbe	11A	Artificial colouring allergy
Frederik	Abu-Roadh	11C	

DietaryNeedsReport.txt - Notepad

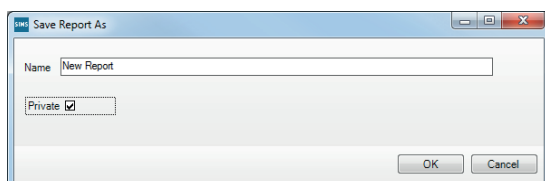
File Edit Format View Help

Surname Forename Reg "dietary needs"  
 Abbey Jimmy 84 "Artificial colouring allergy, Gluten free"  
 Abbot "Claire" 94 "Vegetarian"  
 Abbott "Hannah" 100 "No dairy produce"  
 Abbot James 10C  
 Abbott Susan 88 "No nuts of any type/quantity"  
 Able "Cameron" 98  
 Abrahams "Jacqui" 96  
 Ackrington, Robert  
 Ackroyd  
 Ackroyd

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 emphasise data, **column width**, number of decimal places, etc.



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.



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.

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