



## How to Design a Report with Sub Reports

### Applicable to SIMS .net version

7.78 onwards.

### Permissions required

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

### Introduction

This help sheet describes how to design a report which includes one or more sub reports. When creating a report based on the Student Focus for example, it is possible to include sub reports for Classes, Contacts, Assessment Results, Behaviour, etc.

The example report used within this help sheet is a Word List report which includes a list of pupil/students in Year 6, together with any behaviour incidents recorded against them. The sub report is filtered on the location in which the incidents took place. This could be useful for identifying an area within the school where bad behaviour is persistent.

The design of the main example report includes the following:

- Fields:** Surname, Legal Forename, Gender, Reg Group, Year Group  
**Sort Order:** Reg Group, Surname.  
**Filters:** Display Year 6 pupil/students only

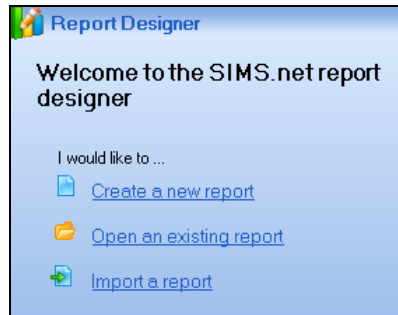
The design of the example sub report includes the following:

- Fields:** Behaviour – Type, Location, Date, Description.  
**Sort Order:** Type  
**Filters:** Select Location when the report is run.

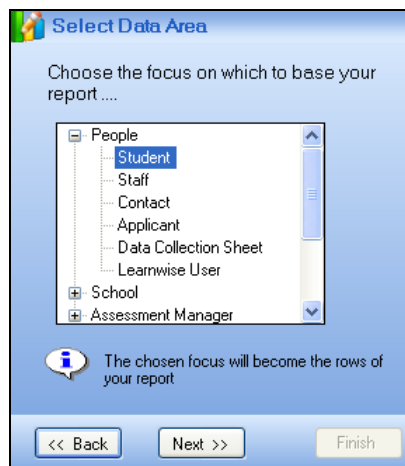
It is assumed that you are familiar with designing simple reports and this help sheet therefore includes only brief instructions on selecting data fields, sort order, etc. For more detailed instructions, please refer to the *How to Design a Simple Report help sheet* (SupportNet Resource Number 11128).

## Designing the report

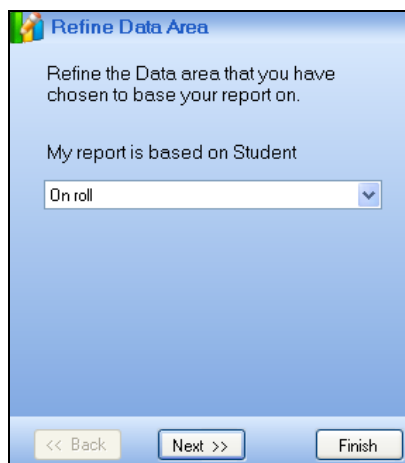
1. Select **Reports | Design** to open the **Report Designer**.



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



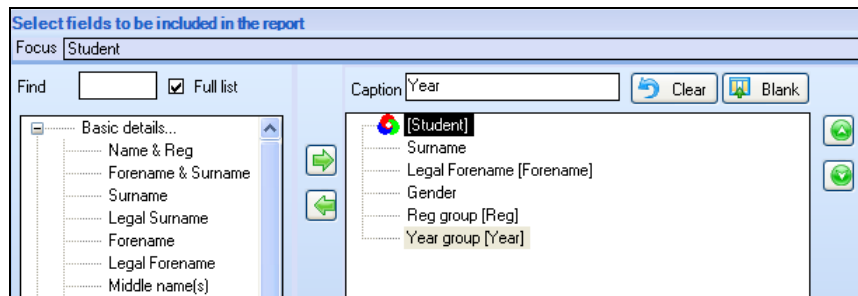
3. Select **Student** as the Focus of the report, then click the **Next** button on the **Report Wizard** to move to the **Refine Data Area** page.



4. Select **On roll** from the **My report is based on Student** drop-down list then click the **Next** button on the **Report Wizard** to move to the **Select Data Fields** page.

## Selecting the fields to include in the report

1. Select the data fields to include in the report by double-clicking each field in the **Select fields to be included in the report** panel. The example report looks as follows:

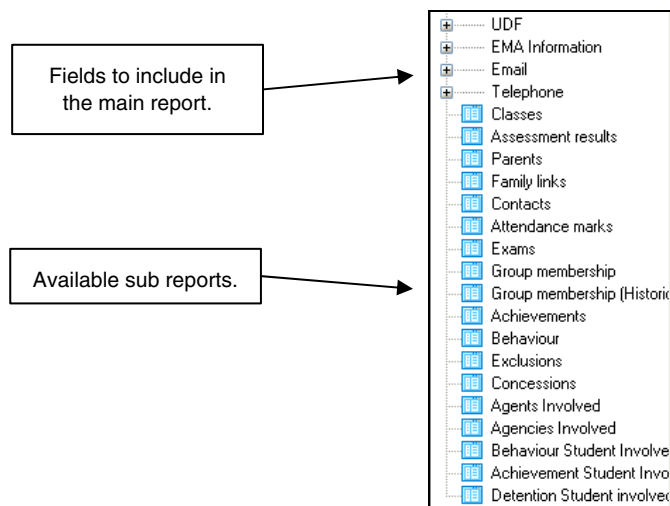


## Inserting the sub report and sub report fields

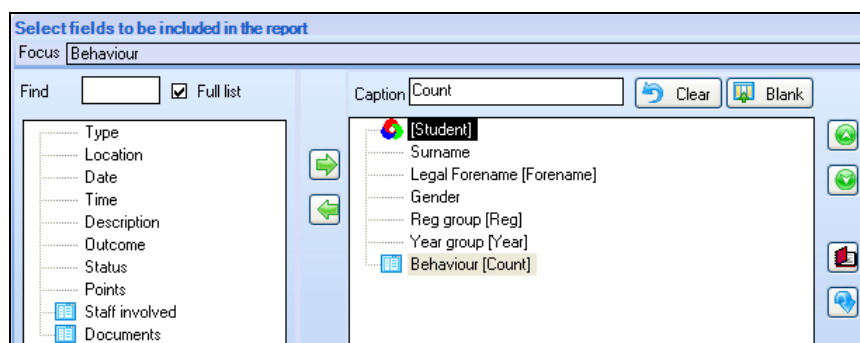
1. Select the sub report to include by double-clicking the required sub report icon at the bottom of the field list (these can be found by scrolling right to the end of the field list).

 *Sub Report Icon*

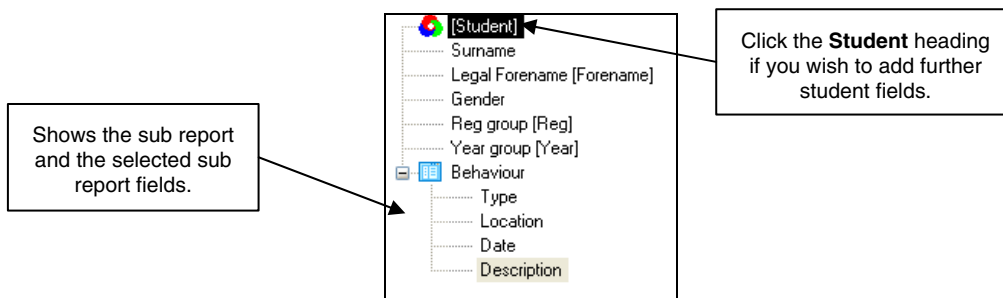
The following example shows the **Behaviour** sub report highlighted:



2. Once a sub report has been selected, the **Select fields to be included in the report** panel changes to display the fields that can be selected for the sub report in the left-hand panel.



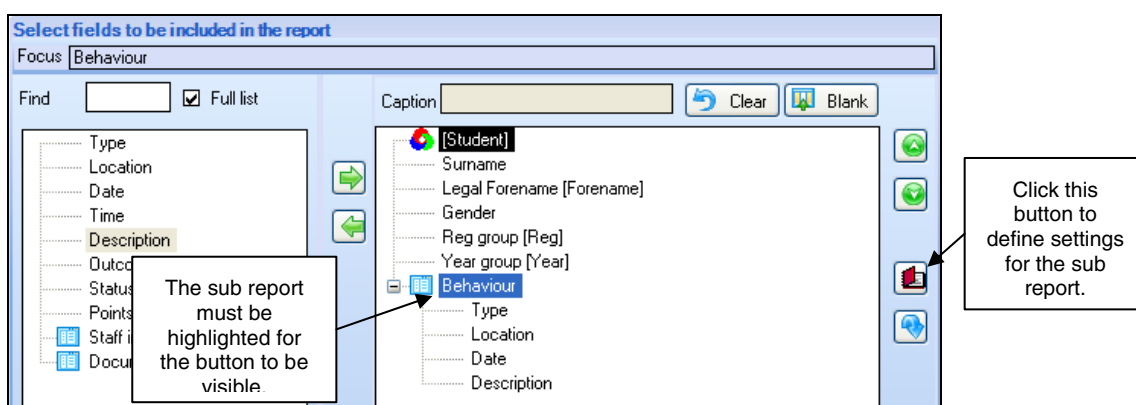
3. Double-click the required sub report fields to select them. Once selected, they appear underneath the applicable **Sub Report** icon in the right-hand panel.




If you wish to add further fields from the student Focus, click the **Student** Focus heading at the top of the field list. The list of fields will change to display student fields.

## Defining the settings for the sub report

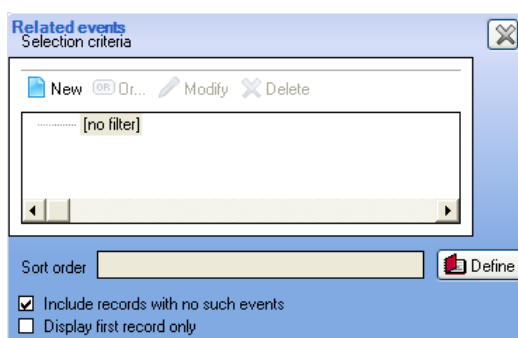
For each sub report, it is possible to add filters, define the sort order and determine which records are returned for each pupil/student in the main report.



Ensure that the sub report name, e.g. **Behaviour** is highlighted in the right-hand panel then click the **Define settings for this sub report** button on the far right of the screen.

 *Define Settings for Sub Report button*

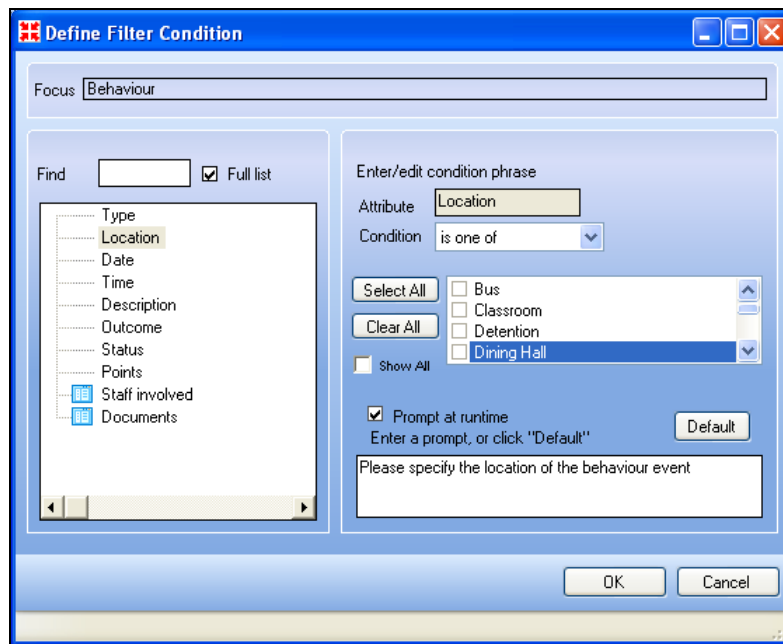
The **Related Events** panel is displayed.



## Applying filters to the sub report

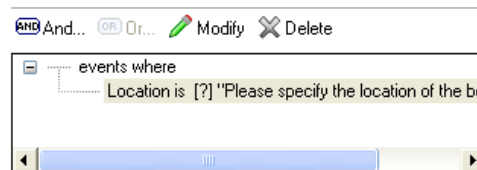
Filters can be applied to the sub report itself to restrict the records returned against each pupil/student in the main report. In this example, a filter will be created which prompts the user to choose the Location of the behaviour event when the report is run.

1. Click the **New** button to open the **Define Filter Condition** dialog.



2. Select the required field, **Attribute**, **Condition** and **Value**. The previous and following example show a filter prompting the user to select the location of the behaviour incident when the report is run.

*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.*

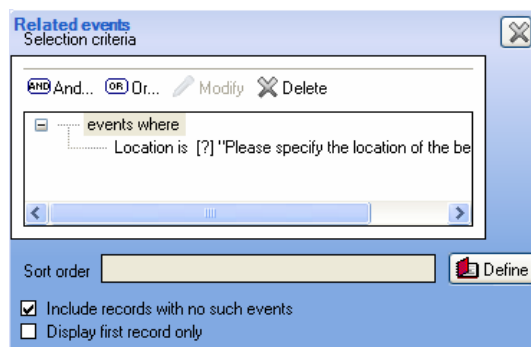


3. Repeat for any further required filters. For more information on applying filters, please see the *How to Use Filters in Reports help sheet* (SupportNet Resource Number 10216).

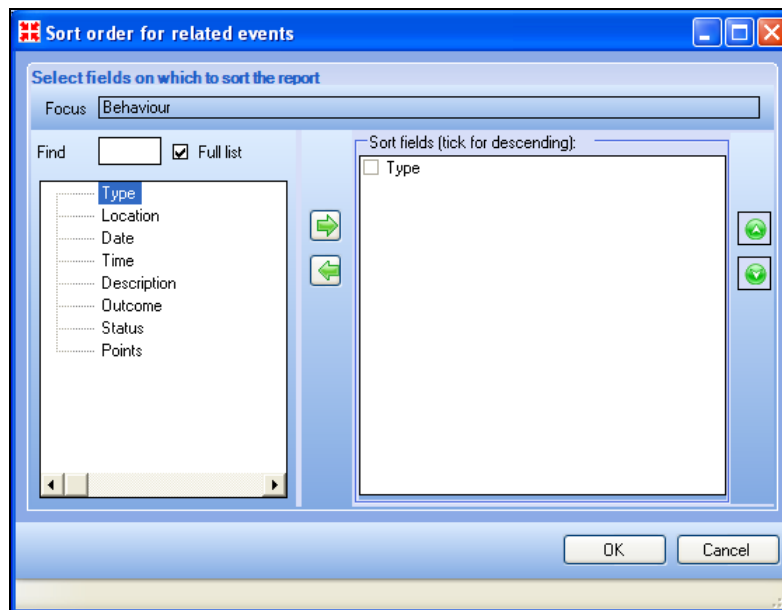
### **Defining the Sort Order for the Sub Report**

A sort order can be applied to the sub report, which defines the order in which the sub report records for each pupil/student will be listed. The example report is sorted in behaviour Type order.

1. From the **Related Events** panel, click the **Define** button adjacent to the **Sort Order** field.



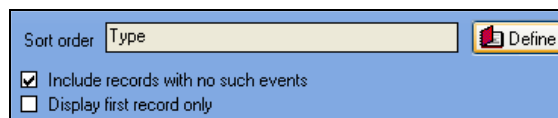
The **Sort order for related events** dialog is opened.



2. Double-click the field(s) on which to sort then click the **OK** button. The chosen sort order is displayed in the **Sort Order** field in the **Related Events** panel.

### ***Including records with no such events***

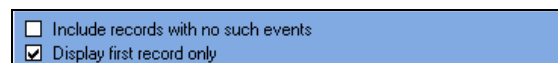
The **Include records with no such events** check box allows you to determine whether a record is returned in the main report if no records are found in the sub report.



Using the example report, if you want to list all pupil/students in Year 6, regardless of whether they have any behaviour incidents recorded against them, ensure the check box is selected. If you only want to list pupil/students in Year 6 with behaviour incidents, ensure the check box is deselected.

### ***Displaying the first record only***

The **Display first record only** check box ensures that only the first record within the sub report is included in the report.

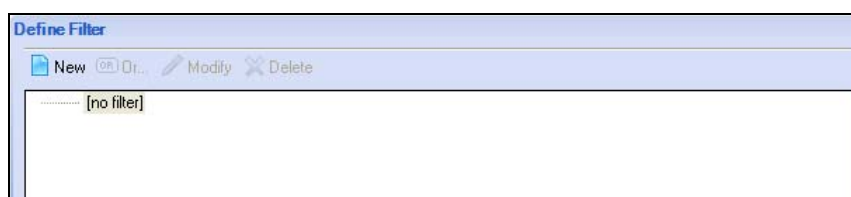


Using the example report, only the first behaviour incident would be listed. It is possible to use a combination of both check boxes if required.

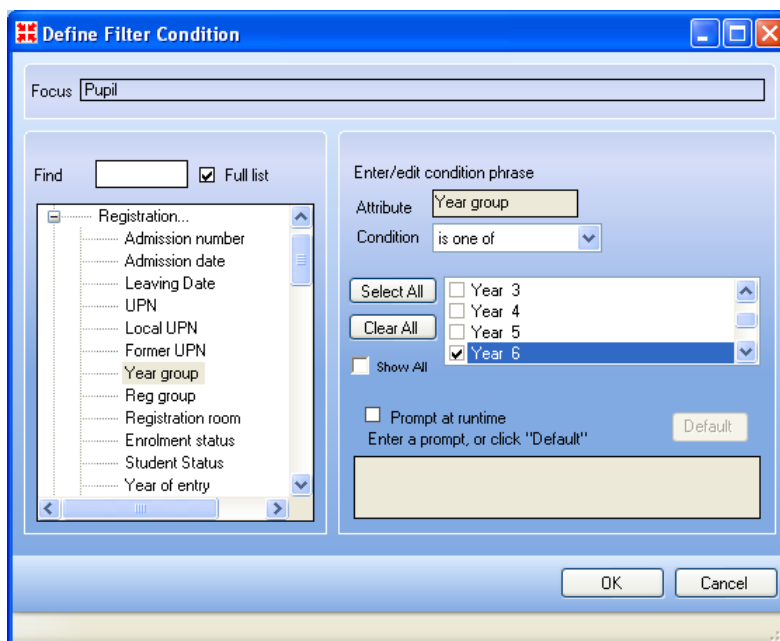
### **Applying filters to the main report**

In addition to applying filters to a sub report, you can also apply a filter to the main report. The example report is filtered to list Year 6 pupil/students only. The overall report therefore, will list all pupil/students in Year 6, with behaviour incidents that occurred in a Location selected by the user when the report is run.

1. Click the **Next** button on the **Report Wizard** to move to the **Apply Filter** page of the Wizard.

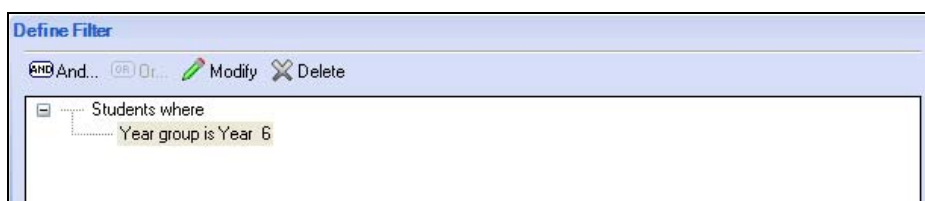


2. Clicking the **New** button to open the **Define Filter Condition** dialog.



3. Select the required **Attribute**, **Condition** and **Value**. The previous and following examples show a filter which will restrict the report to list pupil/students in Year 6.

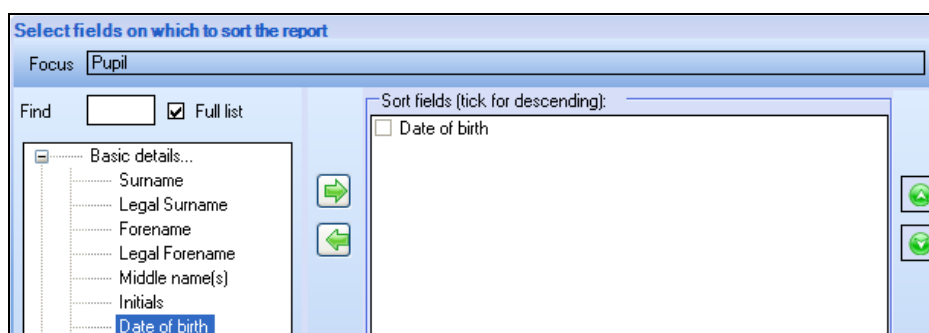
*NOTE: With some values, such as Registration Groups, Year Groups, Look Up Values such as SEN Status, etc., only active items (e.g. this year's Year Groups) are available for selection. If you want to select from all the available items, ensure the **Select All** check box is selected.*



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

## Defining the main report sort order

1. The example report is produced in Surname and Legal Forename order by default. Change the sort order if required, by double-clicking the fields on which to sort.

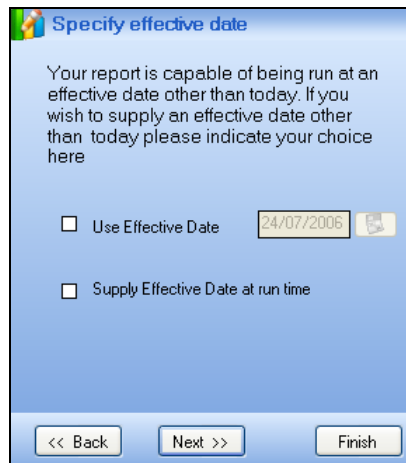


The previous example shows the report is sorted in **Date of Birth** order.

2. Click the **Next** button on the **Report Wizard** to move to the **Specify effective date** page.

## Specifying an effective date (if required)

1. Specify an effective date if required.

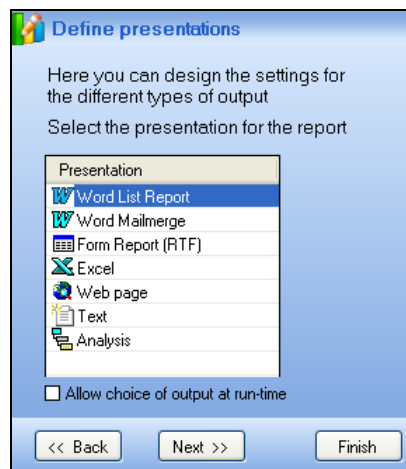


2. Click the **Next** button on the **Report Wizard** to move to the **Define Presentations** page.

## Designing the report output

In the example report, a Word List report output will be produced. For information on how to design other report outputs, please see the applicable help sheets listed in *For more information, please refer to:* on page 10.

Word List report output produces 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. The **Word List Report Settings** pane is displayed.



**Enter required settings for report output types**

Report Title:

Suppress duplicates:

**Word List Report Settings**

Select a template to be used for this report:

Standard Portrait

Standard Landscape

User-defined template

Allow this template selection to be made at run-time

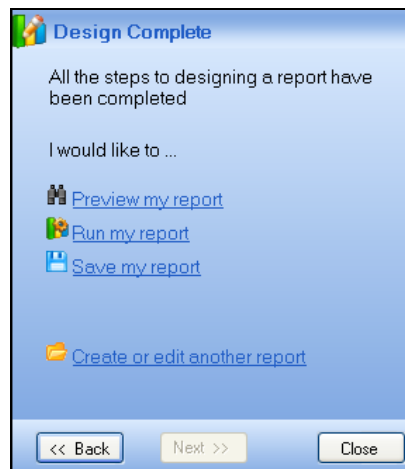
Use Word List reports when you want the report output presented as a simple table. Photo grids and special report fields are also available.

The standard templates are stored locally and can be edited to suit your requirements.

See the on-line help for full instructions.

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 report 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 **Define Presentations** page to move to the **Design Complete** page.



7. Either run, preview or save the report as required by clicking the applicable hyperlink.

When the report is run, the resulting output will look similar to the following:

| Surname | Pupil Forename | Gender | Reg | Year   | Type                 | Location    | Date              | Description  | DateOfBirth      |
|---------|----------------|--------|-----|--------|----------------------|-------------|-------------------|--|------------------|
| Waldock | Michelle       | F      | 6KH | Year 6 | Insolence            | Dinner Hall | 09 September 2004 | Disobeyed teacher  | 21 January 1995  |
|         |                |        |     |        | Assault - Pupil      | Dinner Hall | 01 October 2004   | Threw pencil at 2 girls and punched and kicked                             |                  |
|         |                |        |     |        | Disruptive Behaviour | Dinner Hall | 10 May 2005       | Threw his lunch at a dinner lady.  |                  |
| Khan    | Sajid          | M      | 6VC | Year 6 | Disruptive Behaviour | Dinner Hall | 27 September 2002 | Ran around the dining hall knocking other pupils lunches from their hands. | 28 December 1994 |

## For more information, please refer to:

- *Reporting in SIMS .net handbook* (double-click **Reporting** on the **Documentation** shortcuts panel in SIMS .net).
- *How to Run Reports help sheet* (SupportNet Resource Number 11125).
- *How to Preview Reports help sheet* (SupportNet Resource Number 11133).
- *How to Save or Delete Reports help sheet* (SupportNet Resource Number 11136).
- *How to Design a Word Mailmerge Report Output help sheet* (SupportNet Resource Number 10217).
- *How to Design a Word List Report help sheet* (SupportNet Resource Number 10245).
- *How to Design an Excel Report Output help sheet* (SupportNet Resource Number 10244).
- *How to Design a Web Page Report Output help sheet* (SupportNet Resource Number 10206).
- *How to Design a Text Report Output help sheet* (SupportNet Resource Number 10207).
- *How to Design a Form Report (RTF) Output help sheet* (SupportNet Resource Number 10208).

For access to all available help sheets, please select **Documentation** from the **Resources** drop-down list on the SupportNet home page (<http://support.capitaes.co.uk>), then select **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](mailto:helpsheets@capita.co.uk).

## Help sheet revision history

| Doc. Version | Change Description   | Date     |
|--------------|--|----------|
| 1074-001     | Initial Release  | 20/02/06 |
| 1074-002     | Updated to reflect SIMS .net new looked released with 7.78 plus some general improvements to text. | 01/08/06 |