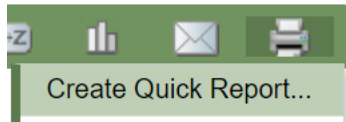


CREATING QUICK REPORTS

Use a Quick report to create a report using the information you are viewing on any list page. Manipulating a Field Sets and Filters can be very useful when creating a Quick Report.

ACCESSING QUICK REPORTS

- Click on the Printer Icon OR



- Reports > Quick Report

CREATING A QUICK REPORT

1. Go to the list page containing the data you want to report on
2. Select the records you want to include
 - a. Use a filter, query, snapshot or custom selection to limit the number of records
3. Click on the **Quick Print icon**
4. Choose an output format OR
 - a. **HTML** will create a finished product for viewing or printing
 - b. **CSV** file will download and open in a spreadsheet for further edit
5. Select **Create Quick Report** to open the quick report wizard

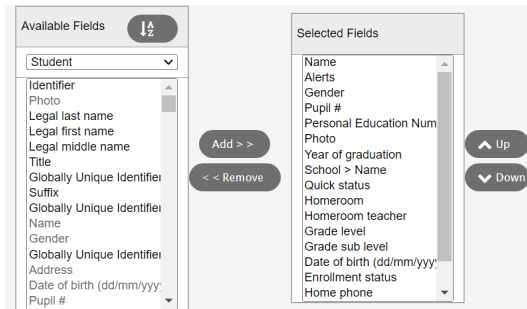
QUICK REPORT WIZARD

Source	
<input checked="" type="radio"/>	New report
<input type="radio"/>	Saved report

1. **Saved report**
 - a. Opens a pick list of all saved Quick Reports
 - b. Choose the report
 - c. Click Finish
2. **New report (8 step wizard)**
 - a. Click **Next** button
 - b. Choose the **Report type** from the drop-down menu
 - i. The description will outline the characteristics of each type

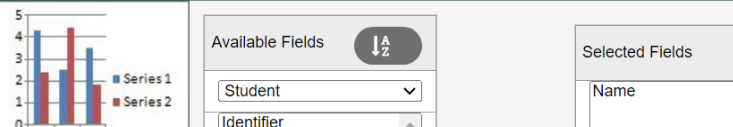
Report type	Simple ▾
Description	This is a simple list format. Pick your columns and sort order, add optional totals or statistics, and run.

- c. Click **Next** button
- d. Add desired fields (**Available fields** → **Selected fields**)
 - i. Highlight > click **Add**



- e. Remove undesired fields (**Available fields** ← **Selected fields**)
 - I. Highlight > click **Remove** button
- f. Reorder the fields
 - I. Highlight
 - II. Click **Up** or **Down**
- g. Click **Next**
- h. **Step 4 - Sort Order**
 - I. Determines how the system sorts the overall report
 - II. Click **Next** button

Quick Report: Sort Order



- i. **Step 5 – Totals and Statistics**
 - I. Determines totals for group reports
 - II. Can provide maximum, minimum and total count statistics for selected fields.
 - III. Click **Next** button

Totals		
Group	Total Count	Page Break
Overall	<input type="checkbox"/>	<input type="checkbox"/>

Statistics	
Name	<input type="button" value="+ Add"/>

- j. **Step 6 – Format Options**
 - I. Provides choices for report title, Body Format (HTML, CSV, TXT), report font
 - II. Click **Next** button

Header	
Report title	Student List - All Active Students
Print date	<input checked="" type="checkbox"/>
Body	
Format	Web Page (HTML) ▾
Exclude byte order mark	<input type="checkbox"/>
Font face	Arial ▾
Font size	Medium ▾
Grid lines	Horizontal & Vertical ▾
Shade alternate lines	<input type="checkbox"/>

k. Step 7 – Field Format Options

- I. Determines field format options such as defining a custom width in number of characters or font style
- II. Click **Next** button

Field: Name ▾

Title	Name
<u>Custom Width</u>	<input type="checkbox"/>
Number of characters	<input type="text"/>
Overflow handling	Wrap ▾
Font face	Arial ▾
Font size	Medium ▾
Bold	<input type="checkbox"/>
Italic	<input type="checkbox"/>
Underline	<input type="checkbox"/>

I. Step 8 – Save Options

- I. Allows the user to save the Quick report for future use by the **User** or **School**
- II. Click **Finish** button

Save Options	
<input checked="" type="radio"/>	Don't save
<input type="radio"/>	Save
<input type="radio"/>	Save as
<hr/>	
Name	<input type="text"/>
<u>Owner</u>	
Type	User ▾
Name	<input type="text"/>