

Reference Guide

Administration Using Quick Reports

The **Quick Reports** panel enables you to use Microsoft Word templates, in XML format, to extract data via individual pages or exemplars. At run-time, the output can be to Word or Adobe PDF. Once a report has been created or imported, the template is specific to your computer.

Templates can be designed as letters or forms. A template can be created independently in Word or by selecting a blank report template. Data items for each field are used in the construction of a quick report template.

A number of quick reports are available in One via the **My Documents\Capita ICS\My Report Templates** folder. The majority of these quick reports are for use with ICS Exemplars, some are for use in the Communication Log. These templates can be customised by adding or removing data items according to your requirements.

One uses entities to link a template to the area where the quick report can be run. For example, the **Parent Notification** report template is accessed via **Quick Reports | Communication Log Correspondence** (*CCS-Entity-CommLogCorrespondence*. *Parent Notification.ReportTemplate*).

The Capita One quick reports are accessed via the Communication Log panel under the following headings:

- Communication Log Correspondence
- Attendance Monitoring Correspondence
- Penalty Notice Correspondence
- Parent Contract Correspondence
- Court Order Correspondence
- Involvements Correspondence
- Exclusions Correspondence
- Relocations Correspondence

Using Capita One Quick Reports

To create a quick report utilising CSS specific entities, select an existing **Communication Log** item or create a new one:

- 1. Select Focus | People | Person/Students to display the Enquiry page.
- 2. Select a person/student.
- 3. Click the **Communication Log** link in the **Links** panel to display the communication log for that person.

Any existing communication logs are displayed in the browse list.

 Click the New button to display the Communication log details [New] page. The Quick Reports panel is displayed on the right, with the Capita One report templates listed below.

You can double-click on a report template to view its data items and content. <u>Do not</u> run the report until the communication log details have been saved.

- 5. Populate the communication log details.
- Click the Save button. The communication log details <u>must</u> be saved <u>before</u> you run a Capita One quick report. You must also <u>check</u> that other related panels have been populated, e.g. Attendance Details for use in the Attendance Home Visit quick report.
- 7. In the Quick Reports panel, highlight the required quick report.
- 8. Click the **Run** button and select **Run as Word** or **Run as PDF** to display the **Save Report As** dialog.
- 9. Select a location to store your report.

If required, alter the **File Name**. A Word document automatically saves as an .XML file. A PDF automatically saves as a .PDF file.

10. Click the **Save** button; the populated report displays in the selected format.

If you have selected your quick report to output to Word, then it is possible to format it.



Dear @CONTACTNAME

Re: @SUBJECTNAME

We are writing to inform you that we are considering making an assessment of @GIVENNAME's special educational needs.

📥 Quick Reports
Action 👻 📝 Run 👻 🔞 Data
Default
Empty
Communication Log Correspondence
Attendance Home Visit
Attendance School Meeting
Parent Notification

Dear

Re: Forename Surname

We are writing to inform you that we are considering making an assessment of Forename's special educational needs.



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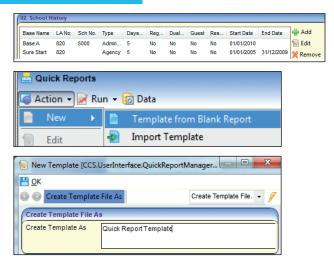
Administration Using Quick Reports

Creating a Quick Report Template

To create your own quick report template:

- 1. Navigate to the area you wish to report on.
- 2. Check the required fields and panels have been populated.
- 3. If any changes have been made, click the Save button.
- In the Quick Reports panel, select Action | New | Template from Blank Report to display the New Template [CCS.UserInterface.QuickReportManager...] dialog.
- 5. Enter the name of the quick report template in the **Create Template As** field.
- 6. Click the **OK** button. The new report template displays in the **Quick Reports** panel.
- 7. Double-click to open the blank report template.
- 8. Give your report a heading.

Continue to the next section to add data items to the template.



Adding Data Items to the Quick Report Template

To add data items to the report template:

 In the Quick Reports panel, click the Data button to display the Data Selection dialog; the dialog box remains on top of your document.

The data items are in UPPERCASE.

Data items containing an @ symbol are for single items. Data items containing an **#** symbol are for group items, where the data is repeated.

2. Highlight a data item and click the **Copy** button (**Ctrl + C** does <u>not</u> work).

Copying a group of data folder copies all the data items in that folder. Clicking the **Copy All** button selects <u>every</u> data item in the **Data Selection** dialog.

 Paste the data item into your template; you can use Ctrl + V or right-click and select the Paste option.

Single (@) data items can be inserted straight onto the page. Group (#) data items <u>must</u> be inserted into a table.

If you paste a group of data items into your document, highlight all the data items, then select Insert | Table | Convert Text to Table | Separate text at Tabs.

- Delete all of the text preceding the @ or # symbols. This text can be used to create headings.
- 5. Adjust the table cells to fit the results of the data items, e.g. **Start Date** and **End Date** can be narrow columns.

Any formatting of the data items can be done now.

6. Click the Save button and close the report template.

To run a quick report that you have created, follow steps 7 - 10 in the Using Capita One Quick Reports section.

Any preceding text that was not deleted in the report template, displays on the populated report.

Data Selection 🛐 <u>C</u>opy 📝 Copy <u>A</u>ll Family Name (@SURNAME) Given Name (@FORENAME) Double Gender (@GENDER) click to Date of Birth (@DATEOFBIRTH) open a ool History (@SCHOOLHIS folder and Base Name (#SCHOOLHISTORY.BASENAME) view the LA No. (#SCHOOLHISTORY, LEA) data items. Sch No. (#SCHOOLHISTORY.SCHOOLNO)

School History Details

Name of Student: → Date of Birth: → Gender: → →	@DATEOFBI	RTH		
¶ Base Nameo	LA·No.¤	School No.g	Start Dates	End Dateg
Base Name:	#SCHOOL	#SCHOOLHISTORY	#SCHOOL	#SCHOOL
#SCHOOLHISTORY	HISTORY.	.SCHOOLNO¤	HISTORY.	HISTORY.
.BASENAME¤	LEA¤		STARTDA	ENDDATE
			TE¤	

IMPORTANT NOTE: You <u>cannot</u> 'type' the data item into your document; you <u>must</u> use Copy and Paste. If you delete any letter, including the @ or # symbols, you <u>must</u> copy and paste the data item again.

School History Details

Date of Birth: Gender:	01/01/2000 7 <mark>Gender:</mark> Fema	le		
Base Name	LA No.	School No.	Start Date	End Date
Base Name: Base A	820	5000	01/01/2010	
Base Name: Sure Start	820	SCHOOLHISTORY .SCHOOLNO¤	01/01/2005	31/12/2009

If the data item displays on the report output, then there is an error in the data item on the template.

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This guide is based on the version of the software (Summer 2014, 3.54) in use at the time of publication.

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