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
- Penalty Notice Correspondence
- Court Order Correspondence
- Involvements Correspondence
- Attendance Monitoring Correspondence
- Parent Contract 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.

4. 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. Do not run the report until the communication log details have been saved.

5. Populate the communication log details.

6. Click the **Save** button. The communication log details must be saved before you run a Capita One quick report. You must also check 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.

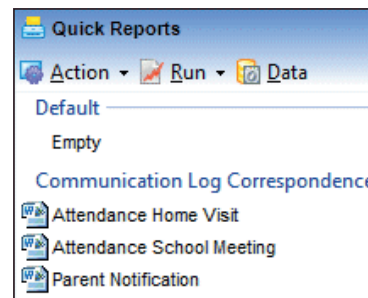9. Select a location to store your report.

   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.
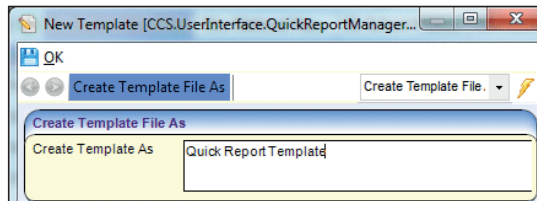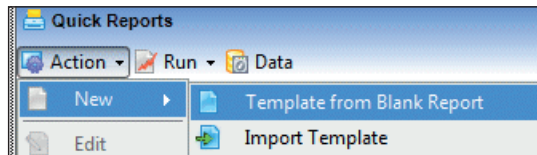
Creating a Quick Report Template

To create your own quick report template:

1. Navigate to the area you wish to report on.

2. <u>Check</u> the required fields and panels have been populated.

3. If any changes have been made, click the **Save** button.

4. 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:

1. 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.

3. 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**.

4. Delete all of the text <u>preceding</u> 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.
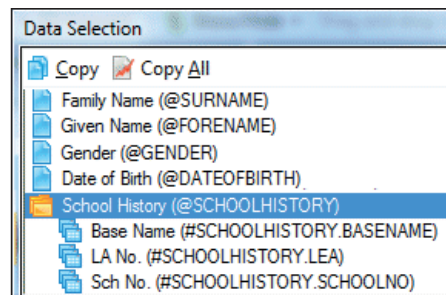
Double click to open a folder and view the data items.

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.

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