

**Reference Guide** 

Governors **Using Quick Reports** 

Quick reports are available from the Governor Details and Governing Body page. A quick reports template must first be created and data fields added. **Creating a Template** 1. Open the required governor details or governing body basic details. Governor Details a a 2. Click the Quick Reports button to nor Telenh display the Quick Reports dialog. - Disqualified × Add onal Email Quick Report 3. Select the Templates tab. tails Training Manager Courses Training Others Disclosure Details Attendance Roles Memo Actions Click the New button to display the 4 🔹 🏢 🔹 🤷 Linked Reports  $\overrightarrow{\mathbb{V}} \quad \text{Governor Type } \overrightarrow{\mathbb{V}} \quad \text{Voting } \overrightarrow{\mathbb{V}} \quad \text{Start Date } \overrightarrow{\mathbb{V}} \quad \text{End Date } \overrightarrow{\mathbb{V}} \quad \text{End Re}$ Quick Reports Template dialog. Middle School Parent Governor Yes 01/09/1990 01/09/1992 Enter a Template Name. 5. 6. Click the Save button. **Quick Reports** Clo Templates Data 🛊 New 🛛 🗶 Delete 🔛 Upload 🔹 💽 Download 🖉 Run as Word 🕅 📆 Run as Pdf 🕅 Is Shared mplate Name Quick Report Template Template Detail Template Name Close Adding Data to a Template 1. Open the required governor details or governing body basic details. **Quick Reports** Close 2. Click the Quick Reports button to display the nalates for Go Quick Reports dialog. Templates Data 3. Select the Data tab. Copy Entity Fields 4. Select the check boxes for the required fields. Home Language @GOVERNORPERSON.FIRSTLANGUAGE 5. Click the Copy button. Ethnicity @GOVERNORPERSON.ETHNICITY Is the person on the Disability Register? @GOVERNORPERSON.REGISTEREDDISABLED 6. Select the Templates tab. National Insurance Number @GOVERNORPERSON.NINUMBER Title @GOVERNORPERSON.TITLE 7. Highlight the required template and click the Reference @GOVERNORPERSON.REFERENCE Download button. Active @GOVERNORPERSON.ACTIVE Disability Number @GOVERNORPERSON.DISABILITYNUMBER 8. Enter a file name (.xml format) and location to Asylum Seeker @GOVERNORPERSON.ASYLUMSEEKER store the template and click the Save button. Are day to day activities substantially affected by physical or mental impairment? @GOVERNORPERSON.DAY Disabilities @GOVERNORPERSON.DISABILITIES 9. Navigate to the location where the template is Family Name @GOVERNORPERSON.SURNAME saved and open the file. Given Name @GOVERNORPERSON.FORENAME 10. Paste the entity fields (selected in Step 4) into the template. The template is displayed with the selected data fields pasted into it. **Quick Reports** Close 11. Format the template as required. Templates Data

- 12. Save the template with a new name.
- 13. Close the template.

Template Name

Femplate 1.xml

🛉 New 😫 Delete 🕼 Upload 👻 Download 👘 Run as Word 👘 Run as Pdf √ Is Shared

No



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## **Governors** Using Quick Reports

## **Running a Quick Report**

- 1. Open the required governor details or governing body basic details.
- 2. Click the **Quick Reports** button to display the **Quick Reports** dialog.
- 3. Select the Templates tab.
- Click the Upload button and select Private or Shared from the dropdown.
- 5. Open the required template file with the data fields included.
- 6. Highlight the required template in the list.
- 7. Click the **Run as Pdf** or **Run as Word** button.
- Click the Open button to open the report. Alternatively, click the Save or Save As button to save it.

Quick Reports	Close
Templates for Governor	
Templates Data	
New XDelete Upload VDownload	
Template Name	Is Shared 🗸
Template 1.xml	No

Quick Reports	Close
emplates for Governor	
Templates Data	÷
New Colete Upload Vownload	
Template Name	Is Shared $$\overleftarrow{V}$$
Governor_Template_2.xml	No
Template 1.xml	No

Related Reference Guides:

- Governors Managing Reports
- Governors Displaying Governor Details
- Governors Amending a Governing Body

## CAPITA

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