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Generate a Quick Report


Use a Quick Report to create an on-the-fly report of the information you are viewing on a list page. You decide what's on it, and the system formats it so that it looks professional.

IMPORTANT: Quick Reports include any records that appear on the current list  (in this example, 4). Use a filter, query, snapshot, or custom selection to limit the number of records to include in the Quick Report.

To create a Quick Report on any list page:

1. On the **Reports** menu, click **Quick Report**. The Quick Report wizard displays Step 1. Do one of the following to determine if you want to create a new Quick Report, or use one you saved:
 - Select **New report** to create a new report.
 - Select **Saved report** to use a report you or another user previously created. The page displays a list of the reports available to you. You can click **Finish** to immediately print the report. Or, to make changes to the report, click **Next** to go to Step 2:


Quick Report: Source
Step 1 of 8



Source

New report

Saved report

6 records 

	Name	OwnerType
<input type="radio"/>	2005 Female Grads	User
<input type="radio"/>	Copy of 2005 Female Grads	User
<input checked="" type="radio"/>	GPA report	School
<input type="radio"/>	Homerroom	User
<input type="radio"/>	Membership	School
<input type="radio"/>	NEMB	User

2. Click **Next**. Step 2 of the wizard appears:

Quick Report: Field Selection **Step 2 of 8**

Available Fields

Student

Photo

Last name

First name

Middle name

Name

Title

Address

Suffix

Local identifier

Gender

State identifier

Date of birth

Year of graduation

Grade level

Homeroom

Selected Fields

Name

Year of graduation

Include in rank

GPA

GPA - Unweighted

Rank - Weighted

Rank - Unweighted

Diploma

Add >>

<< Remove

Up

Down

< Back

Next >

Finish

Cancel

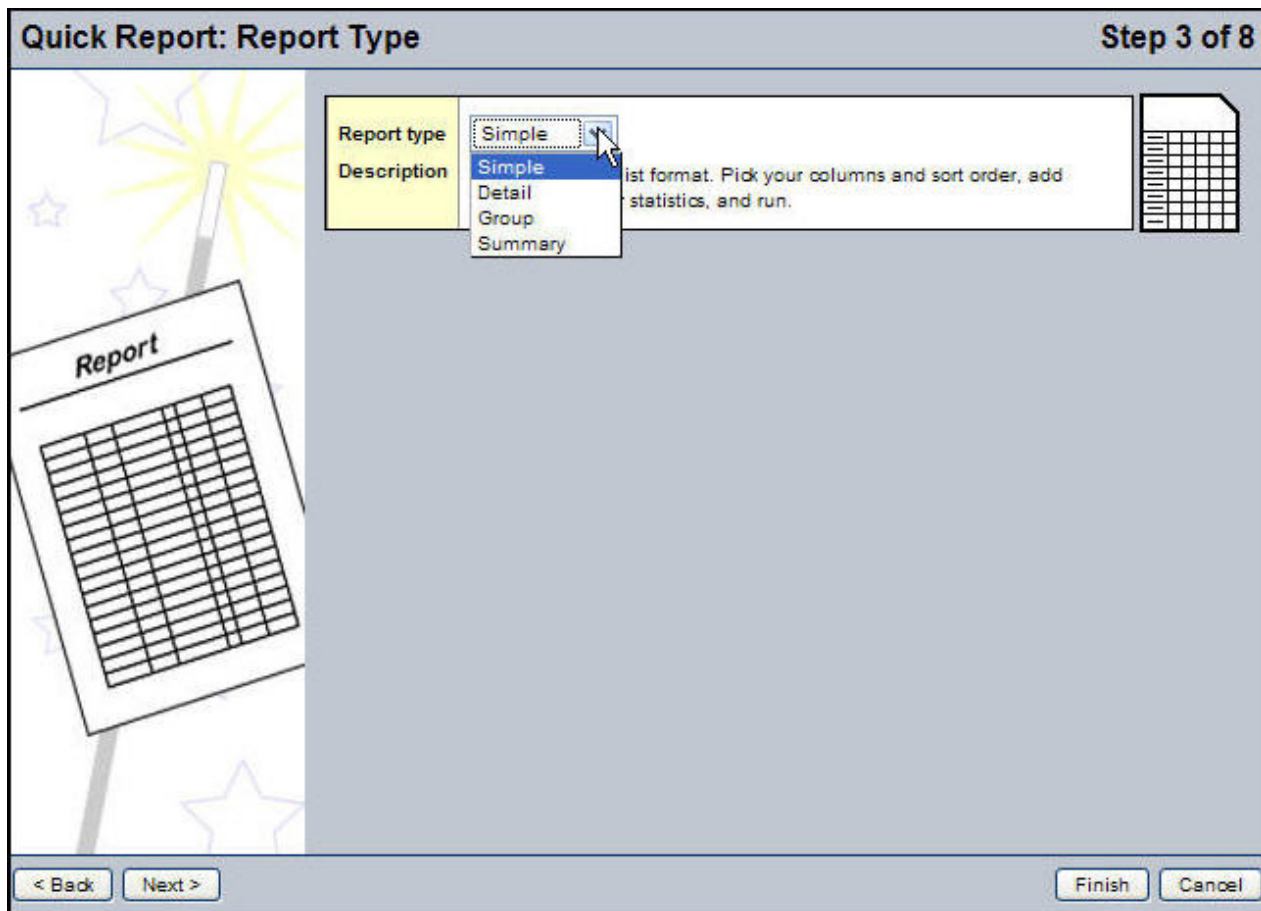
3. Select the fields you want to include on the report and the order you want them to appear in.

Note: If you are creating a new Quick Report, the **Selected Fields** column displays all fields in the current [field set](#) by default. If you are running a saved Quick Report, the **Selected Fields** column displays the fields previously selected for this report.

4. Highlight a field in the **Available Fields** column, then click **Add** to add the field to the **Selected Fields** column. To select several fields next to each other, press **SHIFT** and the **Up** or **Down** arrow on your keyboard to select the fields. To select several fields together that do not appear next to each other, press **CTRL** while you click each field you want to include.

Note: To remove a field from the **Selected Fields** column, highlight it, and click **Remove**.

5. Sort the fields in the **Selected Fields** column to appear in the order you want them on the report. The first field in the **Selected Fields** column is the first field to appear for each record on the report. Highlight a field, and click **Up** or **Down** to move it.
6. Click **Next**. The Quick Report wizard displays Step 3:



7. Use the following table to select the type of report you want to run:

Type	Description
Simple	The simple Quick Report produces a list of the records and fields you select to include. You select the columns and sort order. You can also add totals or statistics, which appear in a summary table below the list of records.
Detail	The detailed Quick Report produces a page for each record, and the report aligns the data fields vertically instead of horizontally. For example, an entire page prints for each student you include. For example, when running a detailed Quick Report on a student-based list, each student record appears on a separate page, with the fields you select as the rows.
Group	The group Quick Report groups records by the fields you select. For example, on a Student List you can group records by homeroom. After you select Group , Step 3 displays the fields available to group records by. Then, on Step 5, you can include page breaks as well as calculate totals by group. For example, use group Quick Reports to print homeroom or bus lists.
Summary	The summary Quick Report hides individual records from the list and produces a list of cumulative values based on the records. Use this report to print totals and other statistical reports. After you select Summary , Step 3 displays the fields available to produce values

for. Then, on Step 5, you can include page breaks, as well as calculate totals.

When you select a report type, a description of the report type and a visual representation of it appears.

8. Click **Next**. The Quick Report wizard displays Step 4:

9. To determine how the system sorts the overall report, such as which records print first, do the following:

- In the **Available Fields** column, highlight the field you want the system to use to sort the report by, and click **Add** to move the field to the **Selected Fields** column. You can continue to select fields and add them below the primary sort.
- In the **Selected Fields** column, highlight the fields and click **Up** and **Down** to determine the sort order (the field that appears first in the column is the primary sort, then the secondary sort, and so on).

10. Click **Next**. The Quick Report wizard displays Step 5:

Quick Report: Totals and Statistics
Step 5 of 8

Totals

Group	Total Count	Page Break
Overall	<input type="checkbox"/>	<input type="checkbox"/>
Year of graduation	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Statistics

Name	Add	Function	Reset By
Home language	<input type="button" value="Add"/>	MAX <input type="button" value="v"/>	Group: Year of graduation <input type="button" value="v"/> ✘
Name	<input type="button" value="Add"/>	MAX <input type="button" value="v"/>	Group: Year of graduation <input type="button" value="v"/> ✘

11. To include totals of records on the report, select the **Total Count** checkbox next the group.

Note: If you select the **Group** report type in Step 3, the report can also include totals by any of the groups you defined in that step. Then, select the **Page Break** checkbox if you want the report to start on a new page after each group and its totals appear.

12. For each field you include on the report, the report can provide the minimum, maximum, and total count of each field. You can also track field averages and sums for numeric fields. Following any statistic selection, if you have selected group by fields, specify exactly when you want that statistic to reset. By default, the statistic will be reset only at the end of the report. If a group field is chosen, the value will be reset at the end of that grouping, allowing you to view group-based statistics.

You can add several statistics and resets for each field.

13. Click **Next**. Step 6 of the Quick Report wizard appears:

Quick Report: Format Options
Step 6 of 8

Header

Report title

Print date

Body

Format

Font face

Font size

Grid lines

Shade alternate lines

Report title:

Print date:

Format:

Font face:

Font size:

Grid lines:

Shade alternate lines:

< Back
Next >
Finish
Cancel

14. Type a title for the report.

15. Select the **Print date** checkbox if you want the report to print the current date.

16. In the **Body** section, do one of the following at the **Format** field:

- Select **Web Page (HTML)** to view the information in an HTML file.
- Select **Comma-separated values (CSV)** to print the information in a text file that separates each field with a comma. The file will be saved with a .CSV extension.
- Select **Comma-separated values (TXT)** to print the information in a text file that separates each field with a comma. The file will be saved with a .TXT extension.

Note: The two comma-separated values formats create identical files; the only difference is the file extension. Some Web browsers only handle one extension properly. Use the extension that works for your browser.

17. If you selected the format of **Web Page (HTML)**, at the **Font face** field, select the font you want the report to print in.

18. If you selected the **HTML** format, select the font size of the report.

19. At the **Grid lines** field, select the type of grid line, (vertical, horizontal, or both) if any.

20. Select the **Shade alternate lines** checkbox if you want the report to shade every other line for easier viewing.

21. Click **Next**. Step 7 of the Quick Report wizard appears:

Quick Report: Field Format Options Step 7 of 8

Field:

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

< Back Next > Finish Cancel

22. For each field that displays on the report (the columns of information that appear), you can define a custom width in number of characters, and specific font and text effects.

Note: If you include a field that contains a large amount of text, you can define the number of characters to display. Then, you can select a value at the **Overflow handling** field. For example, if you select **Wrap**, any text after the custom width appears on the next line of the report.

23. Click **Next**. Step 8 of the Quick Report wizard appears:

Quick Report: Save Options Step 8 of 8

Save Options

Don't save
 Save
 Save as

Name


Owner

Type

Name Administrator, System

< Back Next >

Finish Cancel



24. Do one of the following in the **Save Options** box:
 - Select **Don't save** if you do not want to save the report parameters you just selected.
 - Select **Save** to save any changes you made to an existing saved report.
 - Select **Save as** to save the parameters you entered as a new Quick Report.
25. If you selected **Save as**, type a name for the report.
26. Select the type of report (**User, School, or District**). The options available to you depend on your privileges.
27. Click **Finish**. The report displays the information in the format you selected.