



# Guide to Reporting

## Features and Functions

Release 7.0



"Give the pupils something to do, not something to learn; and the doing is of such a nature as to demand thinking; learning naturally results."

*John Dewey*

## Table of Contents

REPORTING BASICS.....	3
Run a Report.....	4
EXPORT/ADHOC UTILITY – EXP010 .....	7
USER EXPORT/SINGLE – EXP020 .....	9
DETAILED REPORT WINDOW.....	10
SAVED EXTRACTS - SAVEXT.....	17
MANUAL EXTRACT - MANEXT .....	12
DEMOGRAPHIC EXTRACT - DMOEXT .....	13
RENAME AD/HOC FIELDS - EXP050 .....	16

## Reporting Basics

---

A very important feature in a database is the ability to effectively report on the stored information. eSIS does this with exceptional flexibility and comprehensiveness.

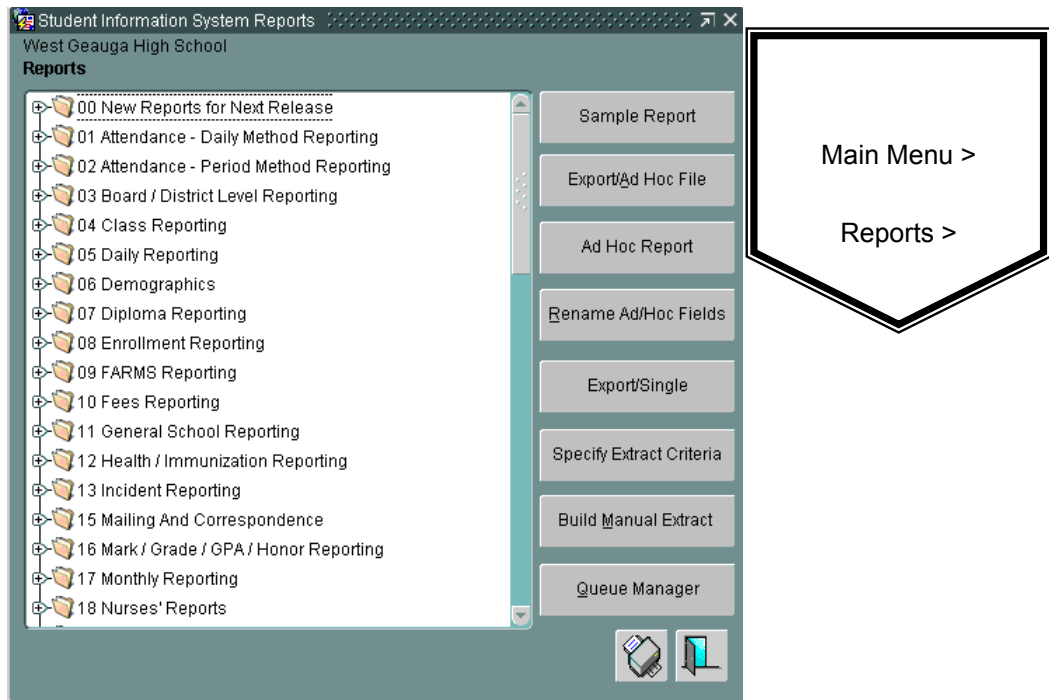
You can choose from a well organized list of over 500 pre-defined reports (canned reports) or, using the adhoc reporting feature, create a custom report and export to a third party software such as MS Excel or MS Word for further presentation enhancement and / analysis.

eSIS Reporting offers many options. You can:

- See sample reports for the predefined reports allowing you to determine the report's utility before the, possibly time consuming, report is run.
- Preview the pre-defined reports before printing.
- Store reports in the Queue Manager for printing at a later time.
- Use the Demographic Extract tool to accumulate or extract required information (for reports that require the information to be first accumulated, such as a list of students who are family couriers).
- Use the Export utility which facilitates the selection and export of eSIS data.
- Use Export Report utility to generate a report for any combination of export fields.
- Customize reports by using parameter forms.

eSIS is fully capable of satisfying all federal, state, and ministry reporting requirements.









The Student Information System Reports window uses the tree metaphor to facilitate organized and logical access to the pre-defined reports in eSIS. The tree is created in Navigation Maintenance where the report groups are defined and reports are attached to them. Every client will customize its tree. The window below is one possibility, probably more extensive than most.



### Student Information System Reports - SISRPTS

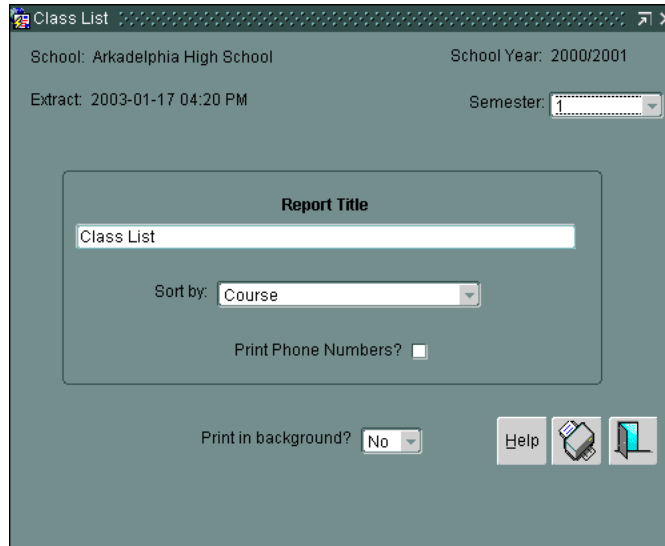
- Click on the plus signs to access a list of reports in each group.
- Double click a report name to initiate the generation and print process.

### Run a Report

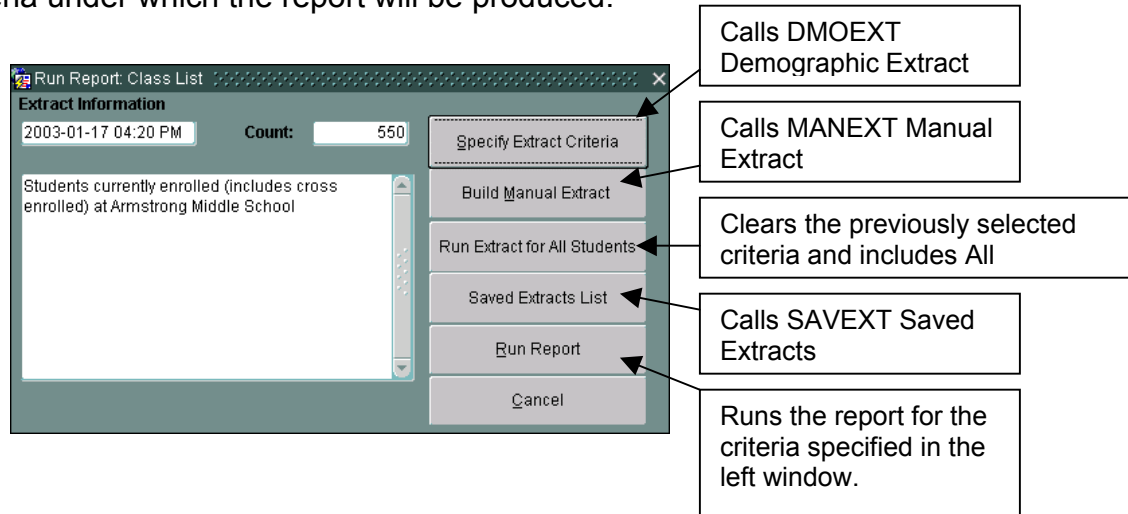
1.   Class Reporting Click on the plus sign to expand the report group.
2.   Class Reporting  
  Class List Select the desired report, e.g.  Class List
3. Click on the  or double click the report name to initiate printing.

4. Any one or combination of the following 3 things may occur:

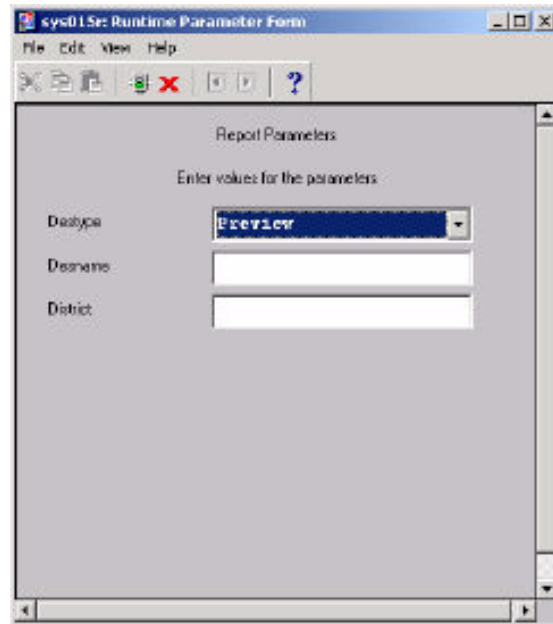
4.1.A Parameter form may be called, facilitating the customization and filtering of the report. Make the desired selections and entries and click the print icon.



4.2.An Extract dialog may be called, which facilitates the application of specific criteria under which the report will be produced.



4.3. If you are using the Client version of eSIS, you will eventually be taken to the selection of Report Parameters where you make a choice of Destination Type (Destype) and click traffic signal button to generate document.



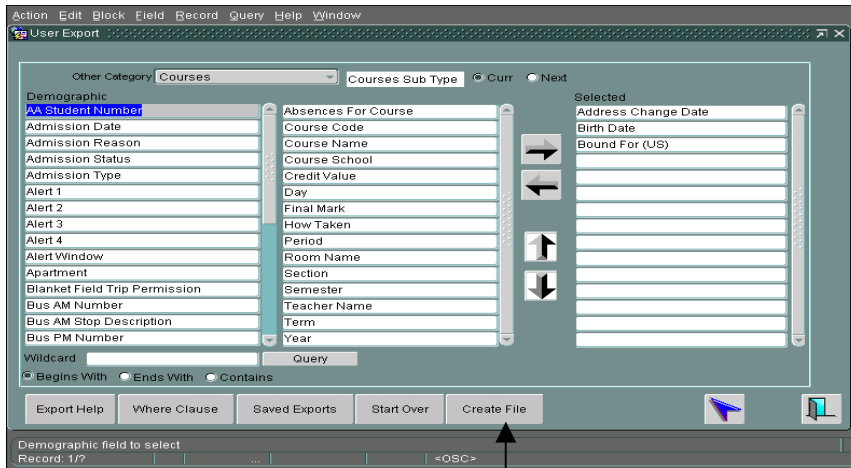
5. The eSIS Web version will take you directly to a 'pdf' preview of the report.
6. Once at the preview, locate the print button to generate a hard copy if required or close the preview.

### Table of Fields – SISRPTS Student Information System Reports

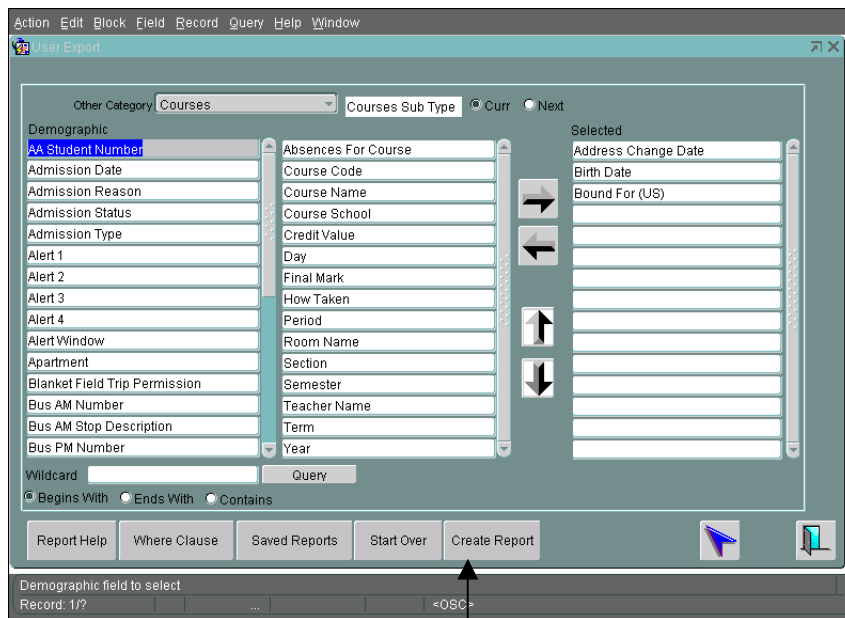
<i>Field Name</i>	<i>Description</i>
Sample Report Button	This button accesses a sample of the selected report.
Export/Ad Hoc File Button	Calls EXP010 User Export an adhoc Export utility which facilitates the selection and export of numerous fields from eSIS.
Ad Hoc Report Button	Calls EXP010 User Export an adhoc Report utility where a report may be generated for any combination of the export fields.
Rename Ad/Hoc Fields Button	Calls EXP050 Rename Ad/Hoc Fields.
Export/Single Button	Similar to the above except limited to one category of fields. See the Export Single Lesson.
Extract Button	Calls DMOEXT Demographic Extract.
Build Manual Export	Calls MANEXT Manual Extract.
Queue Manager	Calls a window which lists reports run in eSIS since the list was last cleared. Reports in Queue Manager reflect data effective on the day it was first run.

# Export/ADHOC Utility – EXP010

The Export / Adhoc utility is primarily intended to allow you to make custom choices of eSIS fields on which to report and to export to a third party software where it may be further formatted and analyzed. Note that the existing Demographic Extract determines records that populate an AdHoc report. See Demographic Extract.





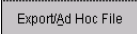
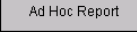
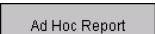
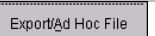


User Export EXP010 User Export



User Export EXP010 User Export

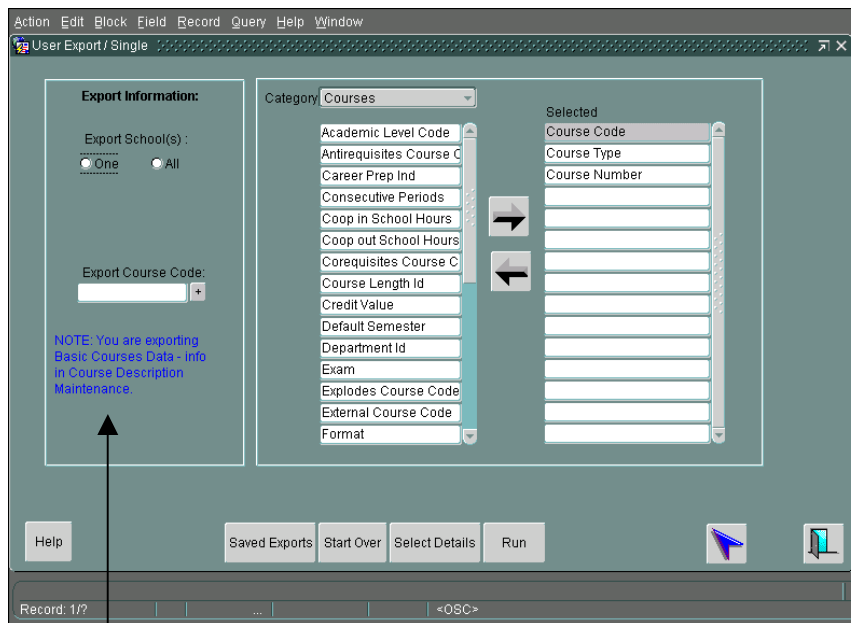


<b>Field Name</b>	<b>Description</b>
Other Category	Includes: Courses, Daily Attendance, Emergency Contacts, Equivalent Credits, Fees, Health, Incidents, Medical, Parents, Period Spec/Period Attendance, Programs, SPED, Standardized Testing, Teams, Transportation, EMIS (if Ohio) Selecting one of these Categories will populate the column below with the fields available for export.
Demographic column	This column contains fields relating to student demographic information and always includes the same selections. The second column will be populated with field choices relevant to the choice of  .
Selected	Field choices selected from the Demographic column to be included in the export.
	Click a desired field from one of the above columns and use the  to Select for report. Use the  to remove a field which is no longer desired in the report. Use the up and down arrows to arrange the order in which the fields will display in the export.
Wildcard Begins With/Ends With/Contains Query Button	Enter the name or partial name of a field to query for a field that Begins with that name, Ends with that name or Contains that name when the Query button is selected. Leave the field blank and click the Query button to list all fields.
Export Help	Displays when screen is accessed by selecting  . Provides assistance on using the Export function of this utility.
Where Clause	This button only displays when the Categories "Courses" or "Marks" is selected. Provides the ability to enter "Where Clauses" for: Absences, Grades and Course information.
Report Help	Displays when screen is accessed by selecting  . Provides assistance on using the Report function of this utility.
Saved Exports	Takes you to a window listing exports which have been saved.
Start Over	Clears any previously selected fields.
Create Report Button	When screen is accessed by selecting  a window which facilitates the exercise of options for the production of a report displays.
Create File Button	When this screen is accessed by selecting  a window that facilitates the exercise of options for the production of an export file displays.

## User Export/Single – EXP020

Export Single is very similar to the Export / Adhoc except now we can work with only one Category of fields at a time and the available categories are limited. Two specific functions are available. It is primarily intended to allow users to make custom choices of eSIS fields on which to report and to export this report configuration to a third party software where it may be further formatted and analyzed. A secondary function is the facility to reorganize the selected fields and print the report from directly within eSIS.

**Note:** When the Course Narrative field information is exported, only the first 120 characters are exported.



User Export / Single - EXP020

“Notes” will change according to the “Category” selected

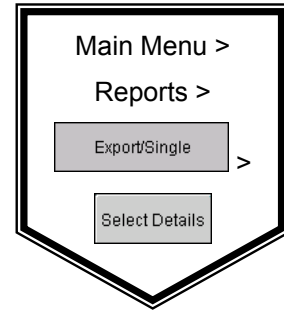
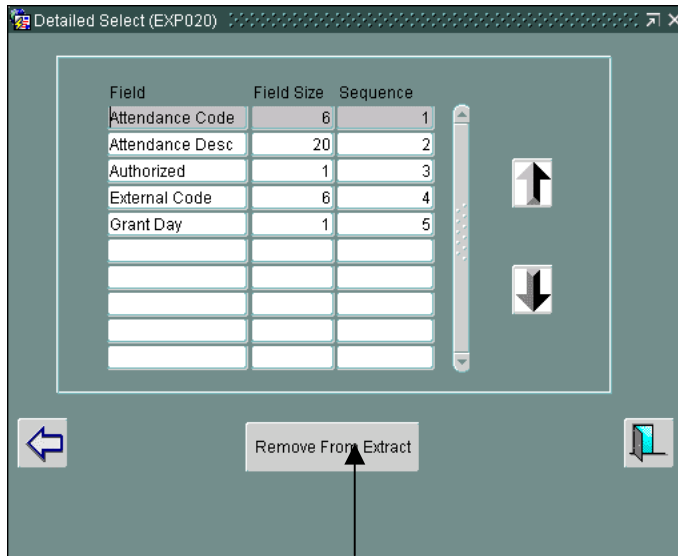
Main Menu >

Reports >

Export/Single

## Detailed Report Window

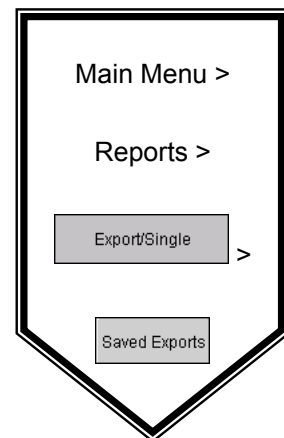
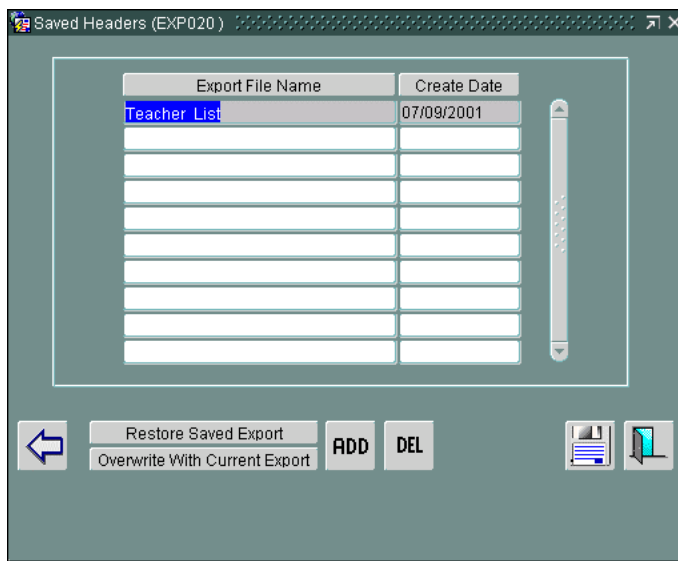
Use this window to change the Field Size or change the order in which the fields will appear. Use the up and down arrow buttons to change the Sequence.



Removes the selected field.

## Saved Headers (EXP020) Window

Use this window to work with Saved Exports.



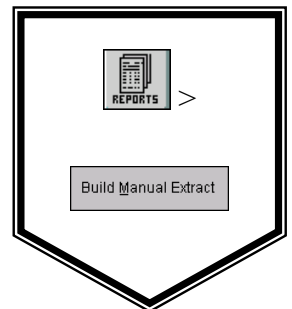
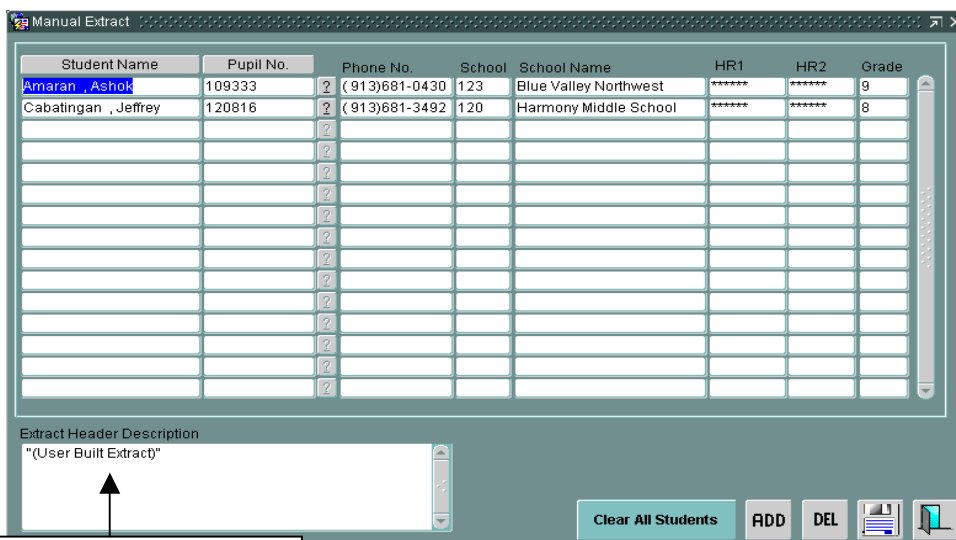
## **Table of Fields – EXP020 User Export / Single**

<b><i>Field Name</i></b>	<b><i>Description</i></b>
Export School(s) – One, All	Indicates if the export is to be run against only the current (One) school or “All” schools.
Export Year – Curr, Next	Indicates if the export is to be run against the current year or for next year.
Export Course Code	The required course to run the export against.
Category	The categories available for single exporting include: Courses, Course Sections, Teachers, Attendance Codes, Comments
Right Arrow/Left Arrow	The Right Arrow drops the highlighted fields into the Selected list. The fields in the Selected column will be exported in the order that they appear. The Left Arrow removes the field from the Selected list.
Help Button	Calls a canvas with information
Saved Exports Button	Takes you to a window listing exports which have been saved.
Start Over Button	Clears any previously selected fields.
Select Details Button	Calls a window which facilitates the reorganization of the fields, change of field widths, and the selection of Report fields from the chosen Export fields. Note that the Report fields are a subset of the Export fields!
Run Button	Calls a window which facilitates the exercise of options for the production of an export file.

# Manual Extract - MANEXT

Use the Manual Extract to create a list of students, one student at a time. This allows total flexibility in selecting students on whom to report.


This window facilitates the selection of students who have little or nothing in common. If there were any identifiably common criteria between students than the Demographic Extract may be more convenient. With this Manual Extract we can build a list by selecting one student at a time.



Use the Extract Header Description field to describe the extract criteria used to select students. This defaults to that of the previous extract.

**Manual Extract - MANEXT**

## Table of Fields – MANEXT.FMX Manual Extract

<b>Field Name</b>	<b>Description</b>
Student Name	The name of the student selected for the extract.
Pupil No.	The unique identification number for the student.
	Calls the Select Pupil screen to assist you in finding a student.
Phone No.	The phone number of the student.
School	The school code where the students attends (home school).
School Name	The name of the school where the students attends (home school).
HR	The student's assigned homeroom.

## Demographic Extract - DMOEXT

The Demographic Extract presents an extensive list of criteria, essentially fields in the eSIS database, which can be selected to specify or narrow-down the information that will populate a report. The report format, columns etc., is not affected, only the content.

The effect of criteria selections is cumulative and search can be executed on an "ALL or ANY" basis. Once applied, the results generated by the selected criteria remain active. This means that if a report, which is subject to the 'DemoExtract', is run and no extract is specified, the report is populated with information from the last extract. These results are a snapshot of the database on the extract run-date. A rule of thumb, then, is to re-run extracts unless, of course, you are looking for information with a past date-stamp.

Some Reports are programmed to use the Demographic Extract. This feature cannot be turned on or off. You may view the reports that have this feature by calling the Navigation Maintenance window.

Action Edit Block Field Record Query Help Window  
Demographic Extract

Note: Leave field blank implies this selection conditions does not apply.

Basic Courses Misc 1 Misc 2 Misc 3 Address Attendance Testing Adv. Farms Schools Results

Cur Year  
Next Year

Legal Name First Name Gender Full/Part-Time

West Geauga High School

Grades NOT HRM 1 HRM 2 Admission Types NOT

Tenth Grade

Include Cross Enrolled Students  
Release of Information - Info. Restriction Type

Release Of Information With No Reason

Internet Access - Internet Restriction Reason

Primary Language spoken at home NOT Program Type NOT Teams Alerts Admission Status

English

OR  
Funding Category

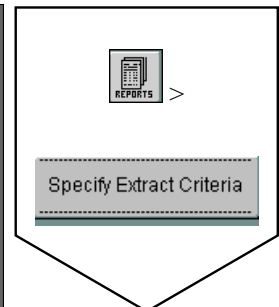
Match Criteria ALL

Interpreter Required Life Threatening Indicator

Requested Materials in Another Language

Clear Extract Criteria Saved Extracts List Run Extract

Choose the School Year  
Record: 1/1



Prior to running a new extract select this button to clear old criteria.

### Demographic Extract - DMOEXT

1. Note that there are several tabs each displaying a canvas of criteria that may be selected.

- Two default selections;  Curr Year and Match Criteria ALL. The choice of Match Criteria is critical; 'ALL' causes the extract to return information that matches all of the selected criteria. 'Any' causes the extract to return information that matches any (one or more) of the selected criteria.

- Use this dropdown list to select a school.

- Grades  NOT  Use the NOT checkbox to exclude the choice below it, e.g. not grade 12 above.

- The Alerts boxes to be used for School Alerts set up on the Basic Demographic screen. STU105.

- Choices on other canvases are obvious. Click in the field and check the Status bar for hints.


- Click this button before creating a new extract. This will ensure that you are starting with a clean slate and that no pre-existing criteria impacts your results.

- After all criteria selections have been made, click this button. After the extract has been processed, an advice window is called indicating the extract status and providing the choice to 'Go Back' to the extract window or to 'See Extract' which takes you to the Results tab of the extract window.

- The Printer button on the Results canvas generates an Extract report, which is simply a view of the selected information and does not reflect the format of the required report.

- To run the actual report, exit the Extract window, save, and then click the



-  Calls a window that facilitates both saving and access to saved extracts.

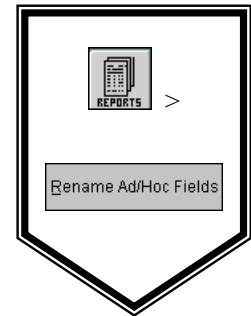
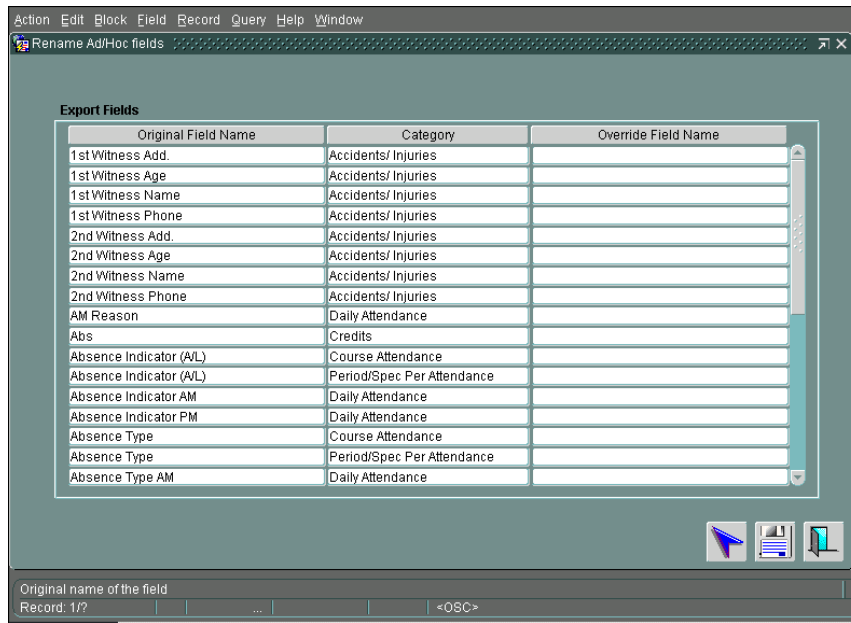
### **Table of Fields – DMOEXT Demographic Extract**

Not all fields are described in this Table. Descriptions of each field are found in their associated forms in eSIS.

<b>Field Name</b>	<b>Description</b>
Current Year/Next Year	Select to include data from this year or next year.
Match Criteria	The choice of Match Criteria is critical; 'ALL' causes the extract to return information that matches all of the selected criteria. 'Any' causes the extract to return information that matches any (one or more) of the selected criteria.
NOT checkboxes	Select the NOT checkboxes to exclude the choice.
Clear Extract Criteria Button	Click this button before creating a new extract. This will ensure that you are starting with a clean slate and that no pre-existing criteria impact your results.
Run Extract Button	After all criteria selections have been made, click this button. After the extract has been processed, an advice window is called indicating the extract status and providing the choice to 'Go Back' to the extract window or to 'See Extract' which takes you to the Results tab of the extract window.
Saved Extracts List Button	Calls SAVEXT Saved Extracts that facilitates both saving and access to saved extracts.

# Rename Ad/Hoc Fields - EXP050

You may use modify the names of fields in the eSIS database for Export Ad/Hoc exports and reports.



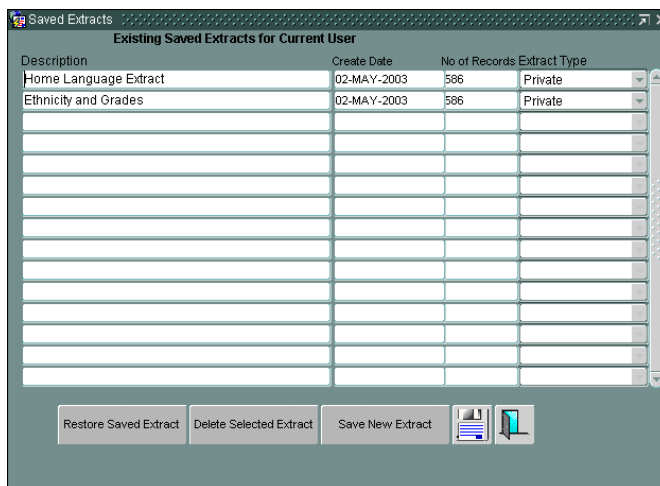
## Rename Ad/Hoc Fields EXP050

### Table of Fields – EXP050 Rename Ad/Hoc Fields

<b>Field Name</b>	<b>Description</b>
Original Field Name	The field name assigned in eSIS.
Category	The area in eSIS where this field is associated.
Override Field Name	The new field name to appear on the ad/hoc export/report.

## Saved Extracts - SAVEXT

You may use this feature to save a list of students created by an extract. You may access this data at a later date but note that the data populating these saved extracts are effective at the run date. Use this screen to access a Saved Extract or to save the active extract. Select the required extract from the list and click Restore Saved Extract. The original extract criteria will be displayed and an updated file can be run against it, or the criteria can be modified, i.e. fields may be added, removed, repositioned.



### Saved Extracts SAVEXT

#### Table of Fields – SAVEXT Saved Extracts

<b>Field Name</b>	<b>Description</b>
Description	The name you assigned to the extract when the extract was saved.
Create Date	The date the extract was created. Auto-populates.
No of Records	The number of records that met the search criteria.
Extract Type	When an extract is saved it will be assigned the Extract Type of "Private". That means that only the user that created the extract will have access to it. "Public Unrestricted" lets other users run the extract as it was created. They may also change the extract criteria and save it as their own extract if needed. "Public Restricted" lets others run the extract but they may not make any changes to it or save it as their own.
Restore Saved Extract	Runs a report of an existing extract.
Delete Selected Extract	Deletes the selected extract.
Save New Extract	Calls a canvas to enter the name of the new extract.