

Simple Ad-Hoc Reporting

The majority of information fields recorded for your pupils can be extracted into either a straightforward report for printing or into a spreadsheet (csv) from which you can make further adjustments and/or print.

To create a simple Ad-Hoc report

1. Go to **Reports > Ad-Hoc Reporting Simple > Ad-Hoc Reports Manager > click +**

In the next screen you will need to add in some basic details and select some formats for your report

2. Enter in a name for your report (this will eventually be the listed name for the report)
You will see that the **Main title** field duplicates the report name but you can change this – the main title is what appears in the printed report
Enter a **Description** for the report – *useful to include points that remind you what this report is going to do*
If you are wanting information about pupils, then leave **Student Type** as Pupils (otherwise you can switch to either of the Staff options)
Security is set to 'do not share' – *if it is a report that you want other users to be able to run, then you can always change this setting later after you have completed and tested the report*
Page Footer is already populated if you have entered a **Default Report Footer** on the **Systems Management>Preferences > Reports** page – otherwise you can add it here if it's a report intended for printing

Report Style - choose **Columns** for a printed report or **Export** for a csv spreadsheet file

The options will then change accordingly:

i.e. If **Columns** is selected, then change the page layout to Landscape if wanted; select horizontal and/or vertical gridlines.

If **Export** is selected, the default 'comma separated' is already selected for you and you need not make any further change

Create Ad hoc Report

Name: Special Group Pupils

Description: For creating list of pupils in Special Group for printing and/or exporting

Type: Student

Security: ☒ Do not share this report
☐ Share this report with all users

Main Title: Special Group Pupils List

Page Footer: Working Towards a Better Community

Report Style:

☒ Columns ☐ Export

Layout Options

Orientation: Portrait

Page Size: A4

Formatting: ☒ Show School logo
☒ Show vertical grid lines
☒ Show horizontal grid lines

Text Control: Wrap text

Font: Arial

Font Size: Medium

(Example Layout)

Next >>

3. Click **Next**

Create Ad hoc Report: Special Group

Data Items:

- Personal
- Parent Guardian1
- Parent Guardian2
- Entitlement Details
- Enrolment Details
- Additional Info
- Medical
- SEN
- Attendance
- Key Stage
- School Details
- ATF Import Parameters
- Exams
- Parental Consent *
- Medical Conditions *
- Disability *
- Disability
- Disability Code
- Pupil Premium Grants *
- Udi
- Custom Items

Included in report:

	Data Item	Column Label
<input checked="" type="checkbox"/>	Surname	Surname
<input checked="" type="checkbox"/>	First Name	First Name
<input checked="" type="checkbox"/>	Key Worker pupil	Key Worker pupil

Please note: Data items marked with *

In the next screen (as above) a list of folders categorising each section of data held for pupils appears in the left pane.

- Choose the data items you want included:** Open each folder (click +) and from the list of data items in each folder, select one or more (CTRL&Click) from each folder and then click the > key to move them to the right hand pane.

There is a range of data items you can choose – then those you have created as UDIs! (Unfortunately pupil photos are not available although we know RM have it on their wish list!)

Note: if you forget to select some items or decide later to remove a data item, you can always edit the report later to make the change!

- Sort the data item columns in the order you want them to appear:** select a data item in the list and use the Up/Down buttons on the right of the screen to make the changes



- Column headings:** the column 'label' can be changed if you don't want the column heading to be the same as the data item label by simply clicking into the box and making the changes e.g. a change of 'First Name' to 'Name'






- Click **Next**


The next screen allows us to think about how we want the information to be sorted i.e. do you want the list in Surname, then First Name order or First Name and then Surname? If you need to view the Year group & Class, you need to ensure that both data items are selected at step 4 above so that you can select to group the information by Year group, then by class etc.. – you can click BACK to go back and select the additional data items.


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Create Ad hoc Report: Special Group

Sorting Options:

Data Item	↓ ↑	Default	Order	Direction
 Current SEN Stage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	↑
 First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	↑
 Key Worker pupil	<input type="checkbox"/>	<input type="checkbox"/>		↑
 Surname	<input type="checkbox"/>	<input type="checkbox"/>		↑
 Vulnerable pupil - coronavirus	<input type="checkbox"/>	<input type="checkbox"/>		↑

8. For the first data item to take 'sorting order' precedence, click in its box in the first column  and then click in the box in the **Default** column - you should then see 1 appear in the **Order** column.

The **Direction** arrow  represents Ascending order (a,b,c,d... 1,2,3,...) – click on it to turn it into a down arrow for descending order if you wish.

9. If you are creating a 'Column' report for printing, you will also see two additional columns here:

Sorting, Totalling and Page Break Options:


Data Item	↓ ↑	Default	Order	Direction	Total	New Page
 First Name	<input type="checkbox"/>	<input type="checkbox"/>		↑	<input type="checkbox"/>	<input type="checkbox"/>
 Known Name	<input type="checkbox"/>	<input type="checkbox"/>		↑	<input type="checkbox"/>	<input type="checkbox"/>

You can click the **Total** box for a data item if you want a total number of entries counted as a total within each category of information e.g. ticking total box for Year Group means that each time a year group changes on a report, a total count for each year group is printed .

Ticking a box under **New Page** for a data item means that every time the information for a data item changes, a new page is started e.g. for year group, each year group will be printed onto a separate page. If you selected New Page for Surname for example, it would mean that every different surname would start on a new page!

Then click **Next**

The next screen for a 'Column' report will give you an idea of what the report layout will look like (ignore the data that appears – it's only for demo purposes!).

You can change the column widths by dragging the top column marker bars  to change column widths or use the **Change Columns** option.


You can also click **Report Layout** to access the first screen of options re gridlines etc.

10. Click **Next** to reach the final screen which summarises the data fields and sort options chose.

11. Click **Finish**

Your report will be created and it will be listed in your 'My Ad-Hoc reports' list.

You will see whether it is a 'Column' report for printing or an Export report, the date it was created and also whether you have shared it with others to use.

12. Now **Run** the report to test whether the report is what you want. Select the report name and click 

You will see the usual report screen – and in the **Select Students By** box, you can change it to Class/Year or


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Group as well as Student Find. You can select a Group or a combination of fields you want to use to search for your pupils to include.

When your pupils have been selected and appear in the criteria screen, click **Generate Report** as normal.

If it is an Export report, a csv file will be created – depending on your browser settings, you can save the file and then open it or you can open the file.

If it is a 'column' report for printing, you can test whether the report is acceptable or whether you need to make further changes. If you do, select the report in the *My Ad-Hoc reports* list and click Edit pencil.

13. If you are happy with the report output, you may want to consider making it a shared report by selecting it in the *My Ad-Hoc reports* list and then clicking on the 

This action will make a copy of this report into the **Shared Reports** section within Ad-Hoc Reporting Simple menu from which other users can run this report.

