



How to Design a Text Report Output

Applicable to SIMS .net version

7.108 onwards.

Permissions required

You will need to be a member of any of the following user groups in System Manager to design reports: *Assessment Coordinator, Class Teacher, Pastoral Manager, School Administrator, Senior Management Team, System Manager, Teachers' Desktop User.*

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

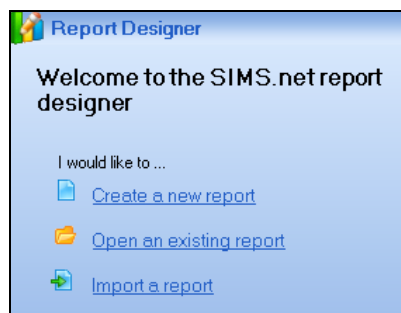
Introduction

This help sheet describes how to design a text report output which should be used when you want to save the content of the report as a text file (.txt, .csv or .xml). This can be useful for importing the resulting file into another application.

It is assumed that you are familiar with designing simple reports. If this is not the case, please refer to the *How to Design a Simple Report* help sheet (SupportNet Resource Number 11128).

Designing a Text report output

1. Select **Reports | Design** to display the **Report Designer**.



2. Click the **Create New Report** hyperlink to display the **Report Wizard** and **Report Summary**. Choose the fields to be included in the report, together with any filters and sort order. For more information on designing a report, please see the *How to Design a Simple Report* help sheet (SupportNet Resource Number 11128).

Report Summary

Report Name:
[effective on:](#) 02/08/2006

- [Data area:](#) Student - Population: On roll
- [Data Fields:](#) Surname, Legal Forename, Gender, Reg group, Ethnicity
- [Filter Students](#) where:
Year group is Year 4
- [Sort Order:](#) Ethnicity, Surname, Legal Forename
- [Default Output:](#) Text
 Duplicates: suppressed in complex reports
 Report Title: Example Report

3. Click the **Default Output** link in the **Report Summary** panel to display the **Define Presentations** page of the **Report Wizard**.

Define presentations

Here you can design the settings for the different types of output
 Select the presentation for the report

Presentation
Word List Report
Word Mailmerge
Form Report (RTF)
Excel
Web page
Text
Analysis

Allow choice of output at run-time

<< Back Next >> Finish

4. Select **Text** from the **Presentation** list to display the **Text File Settings** panel.

Enter required settings for report output types

Report Title:

Suppress duplicates:

Text File Settings

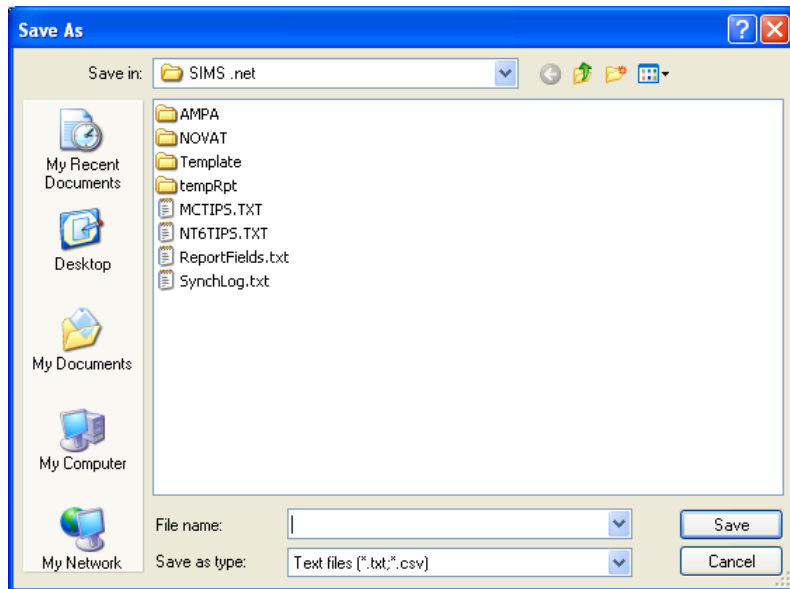
Output to a text file with the following name and format:

Filename:

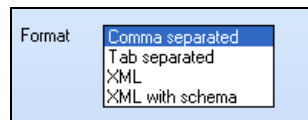
Format: **Comma separated**
 Tab separated
 XML
 XML with schema

Allow these settings to be changed at run-time

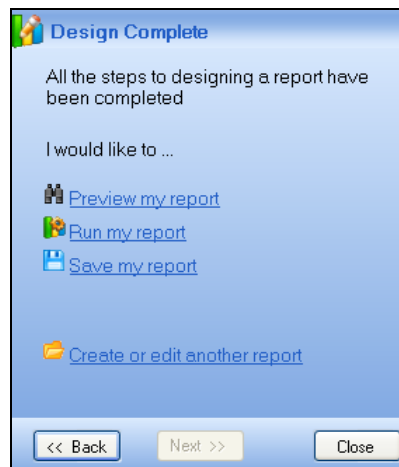
5. Enter a title for the report in the **Report Title** field, if required.
6. Deselect the **Suppress duplicates** check box only if you want any duplicate records to appear in the report.
7. Specify the name and location of the text file by clicking the **Browse** button to open the **Save As** dialog.



8. The default location is \Program Files\SIMS\SIMS .net but this can be changed to any required location.
9. Enter a file name in the **File name** field, then click the **Save** button to return to the **Text File Settings** panel.
10. Select the required text file **Format** type from the following options:



- **Comma Separated** - each value is separated by a comma.
 - **Tab Separated** - each value is separated by a tab.
 - **XML no schema** - each value is XML tagged (tag definition not included).
 - **XML with schema** - each value is XML tagged (tag definition included).
11. Select the **Allow these settings to be changed at run-time** check box if you want to enable the report user to specify the file name, location and file format when the report is run.
 12. Click the **Next** button on the **Report Wizard** to move to the **Design complete** page.



13. Preview, run or save the report as required by clicking the applicable hyperlink.

For more information, please refer to:

- *Reporting in SIMS .net handbook.*
- *How to Design a Simple Report help sheet (SupportNet Resource Number 11128).*
- *How to Preview Reports help sheet (SupportNet Resource Number 11133).*
- *How to Run Reports help sheet (SupportNet Resource Number 11125).*
- *How to Save or Delete Reports help sheet (SupportNet Resource Number 11136).*
- *How to Edit the Quick Letter Template help sheet (SupportNet Resource Number 11047).*
- *How to Design a Word Mailmerge Report Output help sheet (SupportNet Resource Number 10217).*
- *How to Design a Form Report (RTF) Output help sheet (SupportNet Resource Number 10208).*
- *How to Design an Excel Report Output help sheet (SupportNet Resource Number 11170).*
- *How to Design a Word List Report help sheet (SupportNet Resource Number 11169).*
- *How to Design a Letter Report help sheet (SupportNet Resource Number 11171).*
- *How to Design a Web Page Report Output help sheet (SupportNet Resource Number 10206).*

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS .net. Once open, click the **Handbooks** button, select the required handbook category then select the required handbook from the **Handbooks** page.

A sample selection of help sheets are available from the **Documentation Centre** in SIMS .net which can be accessed by clicking the **Documentation** button on the toolbar, then clicking the **Help Sheets** button. All available help sheets can be obtained from our SupportNet home page (<http://support.capitaes.co.uk>) by clicking the **Documentation** button, then selecting **Help Sheets** from the **Categories** drop-down list.

Training courses

For information on training courses, please contact your SIMS Support Provider.

Providing feedback on this help sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help sheet revision history

Doc. Version	Change Description	Date
1073-001	Initial Release	13/02/06
1073-002	Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text.	02/08/06
1073-003	Updated cross references with new documentation location.	10/11/08