



How to Save or Delete Reports

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 save or delete 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 save reports (making them Public for use by others, where required), together with how to delete unwanted report designs.

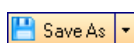
Saved reports are stored on the Document Management Server and by default are saved in the **My Reports** folder and the appropriate **Focus** folder. For example, a report based on the Student Focus will be saved in the **Student** folder.

By default, reports are marked as Private and can be viewed and edited only by you, until you make them Public. This setting can be determined at the point a report is saved. Making a report Public saves a copy of the report to the applicable **Focus** folder for all users who have either Run or Design report Permissions.

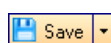
Saving report designs

IMPORTANT NOTE: *If you are saving a report design where you have created or edited an associated template in Microsoft® Word, ensure that the template has been saved and that Word has been closed down before saving. This ensures that the associated template is saved with the report design.*

1. Once the required report design has been achieved:
 - To save the report design for the first time, click the **Save As** button on the toolbar.
 - To overwrite an existing design with the changes just made, click the **Save** button on the toolbar.
 - To save an existing report with a different name, click the **Save** button down arrow and select **Save As** from the drop-down menu.

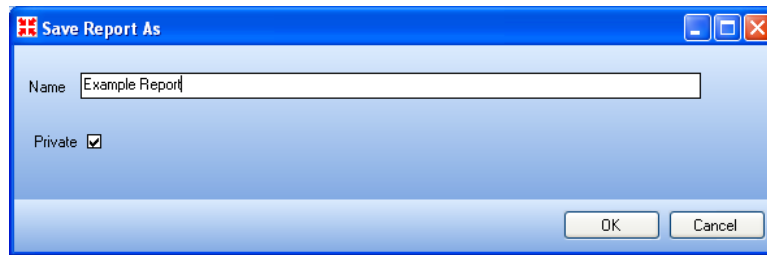


Save As button



Save button

The **Save Report As** dialog is opened.



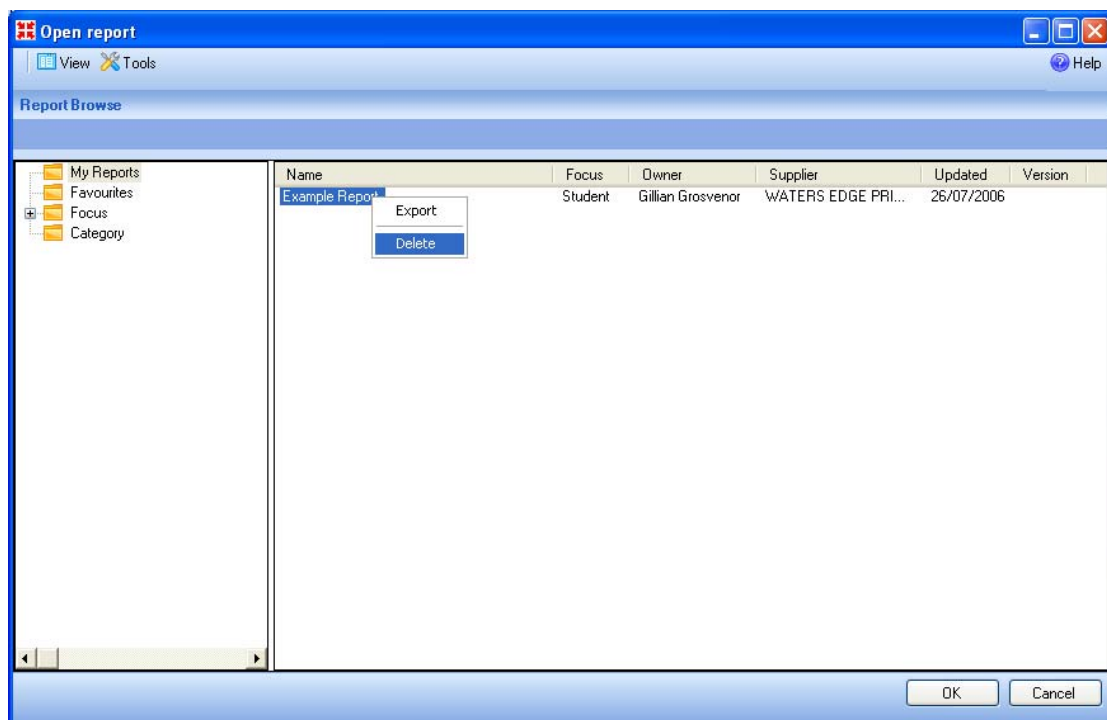
2. Enter the required report name (up to 40 alphanumeric characters, including symbols and spaces).
3. To make the report Public (i.e. accessible to other SIMS .net users with applicable Permissions), deselect the **Private** check box.
4. Click the **OK** button to save the report to the Document Management Server.

Deleting reports

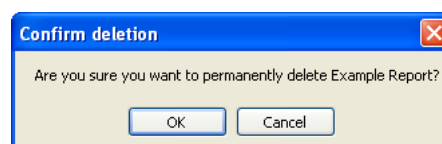
It is possible to permanently delete only reports created by yourself or any pre-defined reports supplied by Capita Education Services (as these can be subsequently re-imported if required).

WARNING: Ensure that the report being deleted has not been inserted into any other report. If it has been used as a sub report, then the other report will not work correctly.

1. Select **Reports | Design** to display the **Report Designer**.
2. Click the **Open an existing report** hyperlink to open the **Open report** dialog.



3. Navigate to the required report, either in the **My Reports** folder, or the applicable **Focus** folder.
4. Highlight the report name then press the **Delete** key. Alternatively, right-click on the report name and select **Delete** from the pop-up menu.



5. A **Confirm deletion** dialog is opened. Click the **OK** button to delete the report design.
The report is deleted from both the **Focus** and **My Reports** folder.

For more information, please refer to:

- *Reporting in SIM S.net* handbook.
- *How to Design a Simple Report* help sheet (SupportNet Resource Number 10196).
- *How to Use Categories to Manage Reports* help sheet (SupportNet Resource Number 10112).

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 and 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 |
|--------------|--|----------|
| 1060-001 | Initial Release | 13/02/06 |
| 1060-002 | Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text. | 26/07/06 |
| 1060-003 | Updated cross references with new documentation location. | 06/11/08 |