sims .net supporting schools

Help Sheet

How to Add Filters to a Report Design

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 make use of the many filtering options available when designing reports. Filters are applied to reports to restrict the data returned, such as all the pupil/students in Year 6 or all the pupil/students who have diabetes as a medical condition. Unless you want to include all available records within the report, you will need to restrict the records returned by applying one or more report filters. A filter consists of the following elements:

Attribute – the item of data on which to filter, e.g. Surname, Year Group, Gender, etc.

Condition – the condition to apply to the attribute, e.g. equals, is less than, begins, contains, etc.

Value – the actual value to filter against, e.g. Smith, Year 6, Female.

Prompt – the text to display to the user at run-time, e.g. Select Year Group.

Defining/editing a filter

1. Select **Reports | Design** and create the report design in the usual way. If required, please refer to the *How to Design a Simple Report* help sheet (SupportNet Resource Number *11137*).

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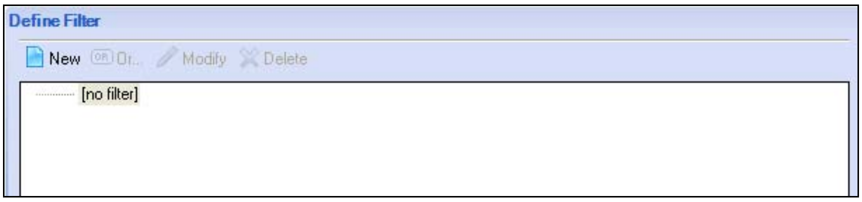
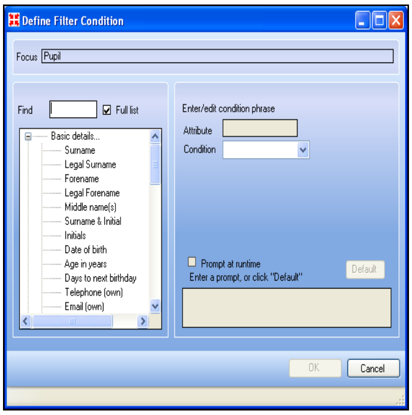
TIP: If you have any existing report that contains the same or similar filters, it is far easier to copy these existing filters into your report. Please see Loading an existing filter from another report design on page 3 for more information.

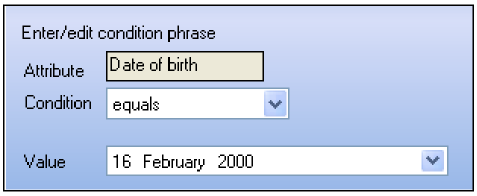
2. From the **Report Summary** panel, click the **Select all Students** hyperlink (labelled according to the Focus of the report) to display the **Define Filter** panel.



3. Click the **New** button to create a new filter or edit an existing filter, highlight the required filter and then click the **Modify** button. The **Define Filter Condition** dialog is opened.



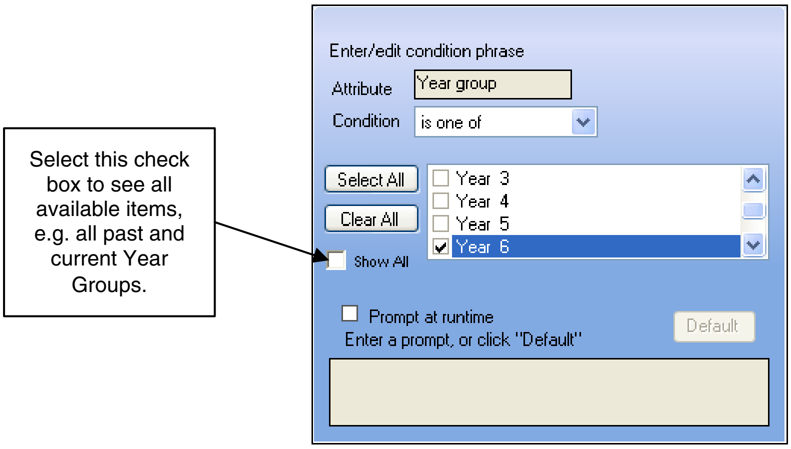
4. Select the required **Attribute** by expanding/contracting the field list using the **+** or **–** icons as required. The **Enter/edit condition phrase** options will change according to the type of field selected.
5. Select a **Condition** from the drop-down list.



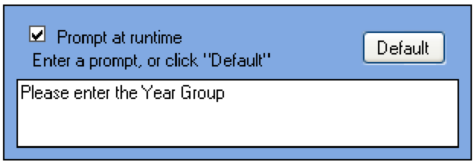
For example, if the **Age in years** Attribute (field) is selected, Conditions will be made available for numeric fields, i.e. Equals, Does Not Equal, Less Than, Greater Than and Between. For a list of all the available conditions, together with their meanings, please see the *Reporting in SIMS .net* handbook.

6. Specify a **Value** based on the previously selected condition.

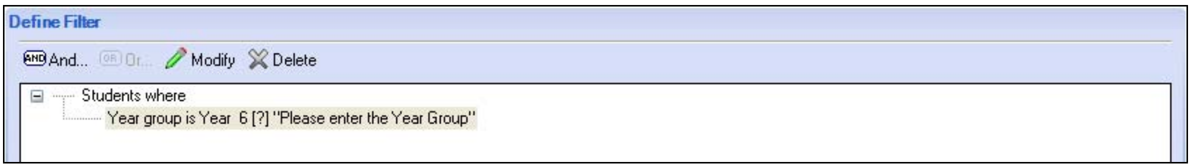
*NOTE: With some values, such as Registration Groups, Year Groups, Look Up Values such as SEN Status, etc., only active items (e.g. this year's Year Groups) are available for selection. If you want to select from all the available items, ensure the **Show All** check box is selected.*



7. Add a Prompt if required. This allows you to prompt the report user to select the value for the filter when the report is run. Select the **Prompt at runtime** check box. A default prompt is entered based on the attribute name, which can be amended if required, e.g. **Please enter the Year Group**. Click the **Default** button to return to the default prompt if required.



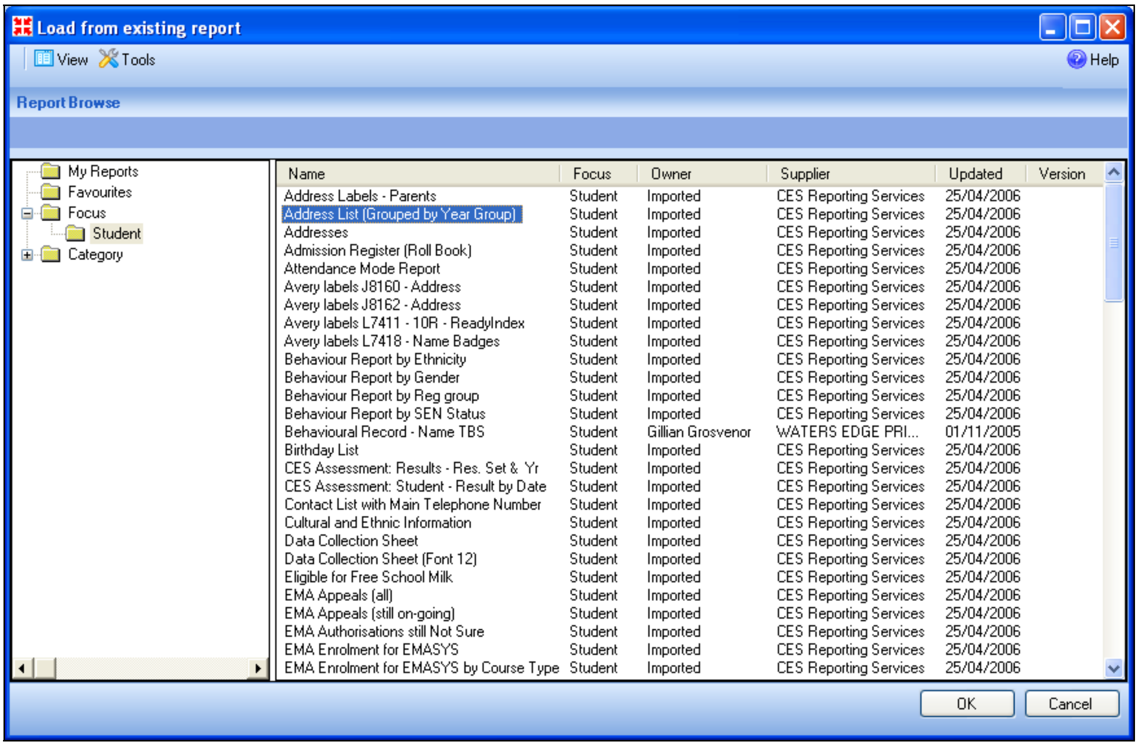
8. Click the **OK** button to add the filter and return to the **Define Filter** panel. The newly created filter is displayed.



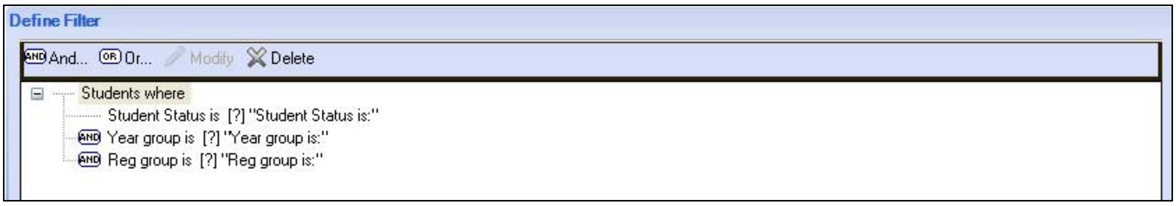
Loading an existing filter from another report design

To save time, it can often be useful to load an existing filter created in another report design (including pre-defined reports supplied by Capita Education Services).

1. From the **Apply Filter** panel, click the **Load from an existing report** hyperlink to open the **Load from existing report** dialog.



2. Select the required report in the usual way and then click the **OK** button.



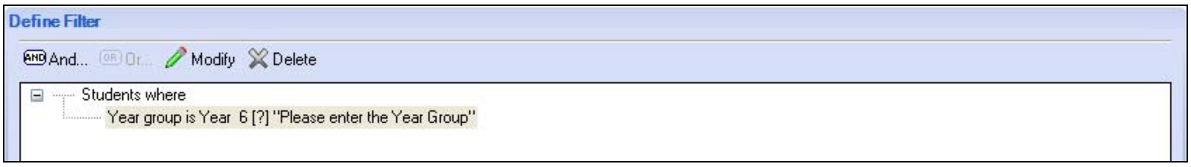
The filter(s) used in the loaded report are imported into the current report design and can be edited as required.

Adding an AND filter

There may be occasions when you want to apply more than one filter where BOTH the filters must be matched. For example, where the Year Group equals Year 6 AND the Gender is Female. Several AND filters can be added where data will only be returned where it matches ALL the filters.

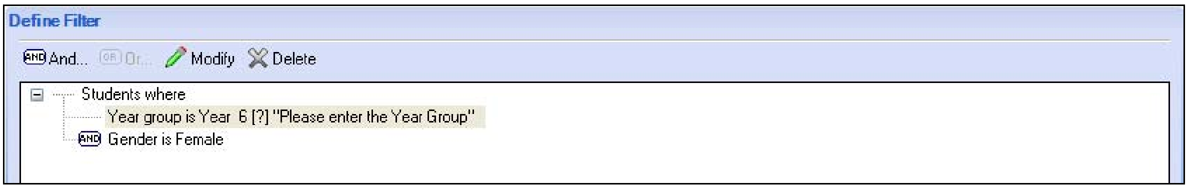
In addition, OR filters can be added (please see the next section for more information).

1. Define the first filter as described in *Defining/editing a filter on page 1.*
2. From the **Define Filter** panel, highlight the filter to which you wish to add the AND filter.



3. Click the **AND** button to open the **Define Filter Condition** dialog.
4. Add the AND filter in the usual way and then click the **OK** button to close the **Define Filter Condition** dialog.

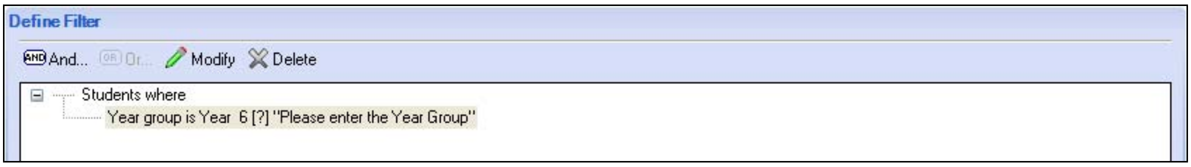
   The **Define Filter** panel is updated to include the new filter which is appended to the existing filter and preceded by the word **AND**. Further filters can be added as required.



Adding an OR filter

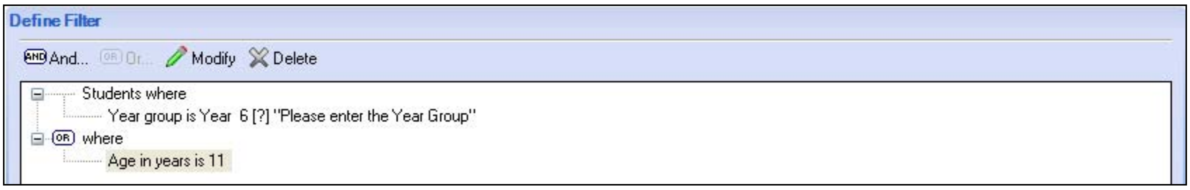
An OR filter allows you to define filters where EITHER filter must be matched. For example, Year Group equals Year 6 OR Age equals 11 years. Pupil/students that match either condition will be returned in the report. In this example, all Year 6 pupil/students together with any other 11 year olds will be returned.

1. Define the first filter as described in *Defining/editing a filter on page 1.*
2. From the **Define Filter** panel, highlight the **Focus** of the filter, e.g. **Students where**.



3. Click the **OR** button to open the **Define Filter Condition** dialog.
4. Add the OR filter in the usual way and then click the **OK** button to close the **Define Filter Condition** dialog.

   The **Define Filter** panel is updated to include the new filter, which is appended to the existing filter and preceded by the word **OR**. Further filters can be added as required.



Adding combinations of AND/OR filters

It is possible to join several filters together with an **AND**, and also have combinations of **AND** and **OR**.

Complex criteria can be generated in this way. It is advisable to save complex report criteria selections for future use.

Deleting filters

1. From the **Define Filter** panel, highlight the filter to be deleted and either press the **Delete** key or click the **Delete** button.
2. To delete all filters attached to the current report, highlight the **Focus** (which is followed by the word 'where'), e.g. **Students where**, and either press the **Delete** key or click the **Delete** button.

For more information, please refer to:

- *Reporting in SIMS .net* handbook.
- *How to Design a Simple Report* help sheet (SupportNet Resource Number *11137*).
- *How to Preview Reports* help she (SupportNet Resource Number *11138*).
- *How to Run Reports* help sheet (SupportNet Resource Number *11125*).
- *How to Save or Delete Reports* help sheet (SupportNet Resource Number *11136*).

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 Cente** 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
1054-001	Initial Release	14/02/06
1054-002	Updated to reflect SIMS .net new look released with 7.78 plus some general improvements to text.	31/08/06
1054-003	Updated cross references with new handbook location.	05/11/08