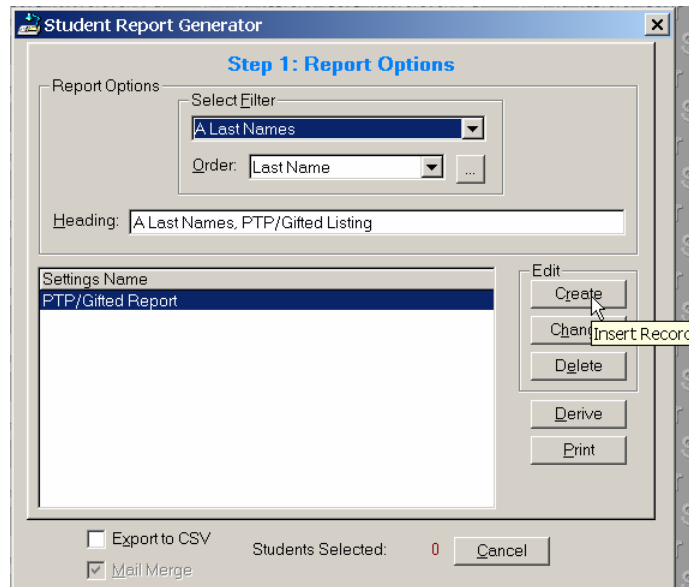


STIOffice – Custom Reports

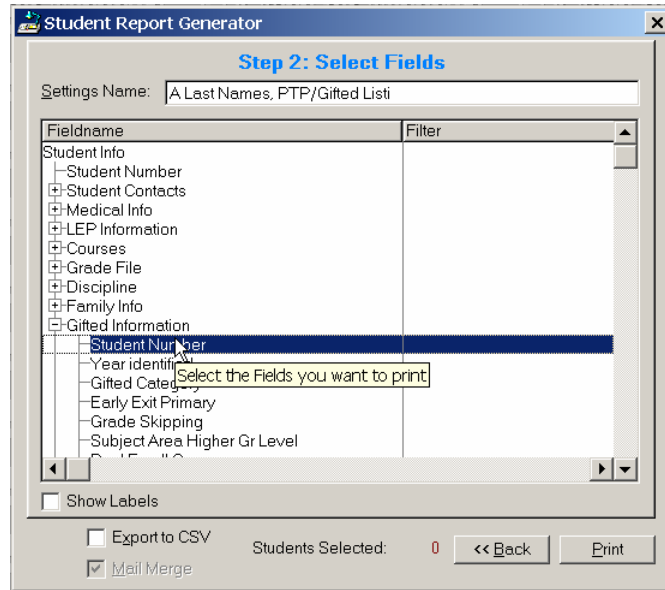
Creating a Custom Report

Custom Reports are used to generate group reports based on data collected from a variety of student fields, such as demographics, courses, discipline history, medical information, grade file information, and family details.

To create a custom report, select **Students | Student Reports | Custom Reports** and perform the following steps:

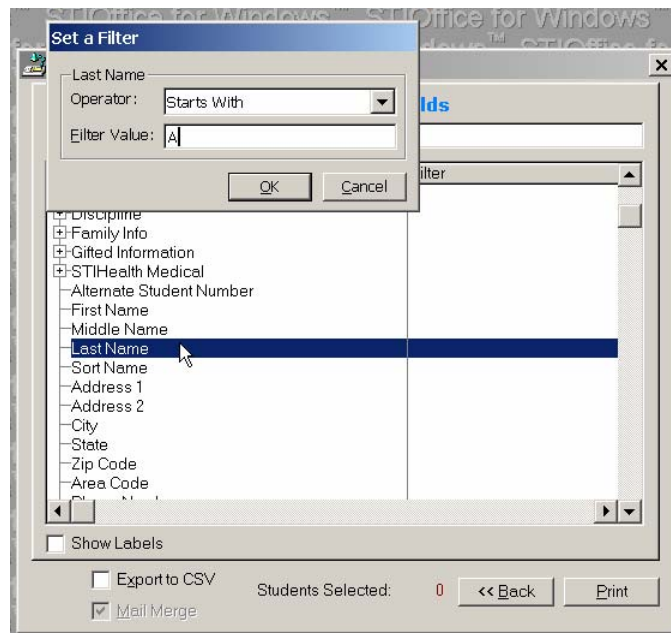


- Choose a student filter.
- Choose the *Order* in which students are to be listed in the report (by *Last Name*, *Home Room*, etc.).
- Enter a customized *Heading* for the report.
- Click **Create**.
- Click on each data field to be included in the report. Any field highlighted in blue will be included. Click on headings marked with the + symbol in order to view all the fields listed within each heading.



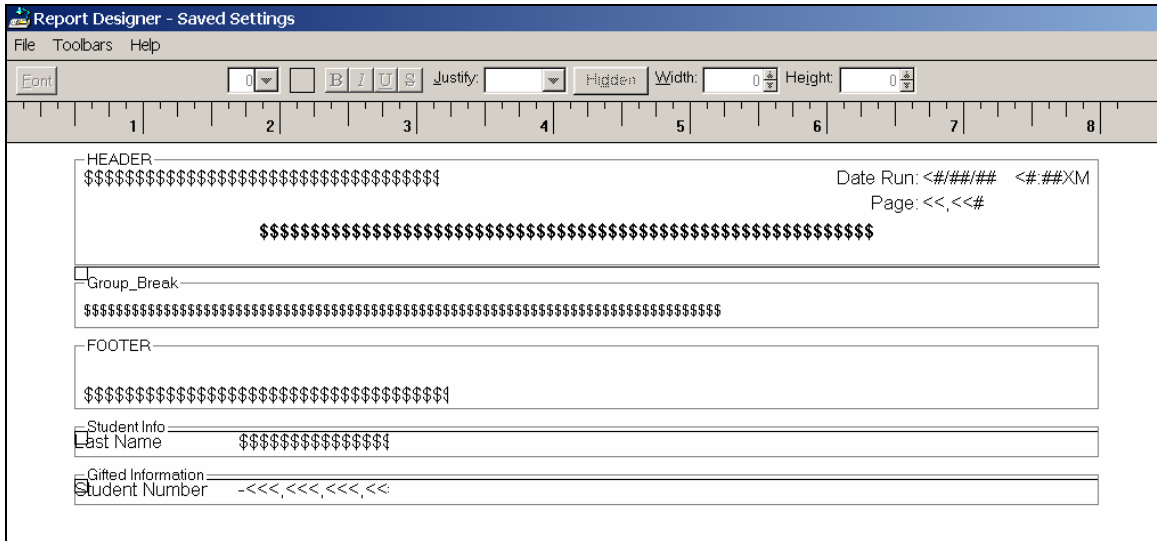
Note: Fields will print in the order they appear in the select list, unless the *Report Designer* is used to move them.

- Right click on a field to create a *Filter* on that field. Select the *Operator* and enter the *Filter Value*. If multiple fields are filtered, the operator is assumed to be *AND*. This means all filters must be true for the results to print.



- Check the *Show Labels* box to display the name of each selected field on the report. If the *Show Labels* box is not checked, the information will appear on the report without labels. For example, *Last Name: Smith* would appear on the report including labels; otherwise only *Smith* would appear, without the *Last Name* label.

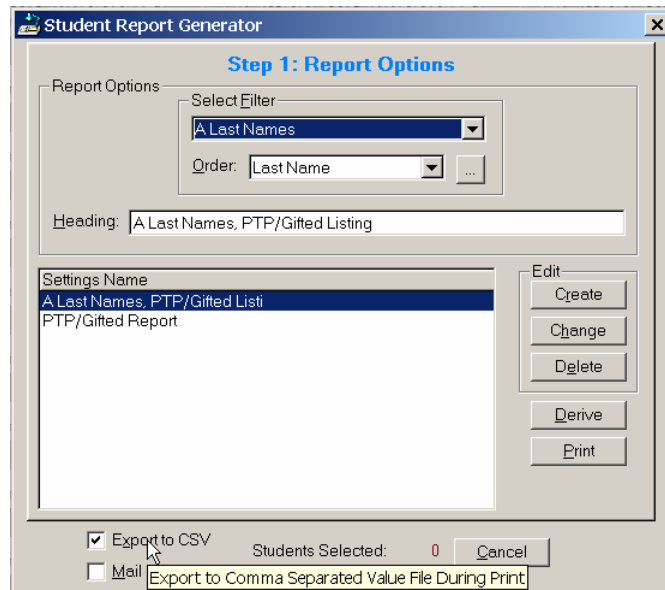
- Check *Export to CSV* to create a comma-separated file of the data selected for the report. See “Creating a CSV (Comma Separated Value) File” on page 3 for more details.
- Check *Mail Merge* to merge selected fields with Microsoft® Word®. See “Creating Customized Mail Merge Tags” on page 4 for more details.
- Click **Print**.
- The *Report Designer* menu will appear. For specific instructions on using the report designer, please refer to the *STIOffice – Report Designer Quick Reference Guide*.



- Select **File** at the top left of the screen and click **Print**. The report will be generated.

Creating a CSV (Comma Separated Value) File

- After selecting fields to print, check the *Export To CSV* box.



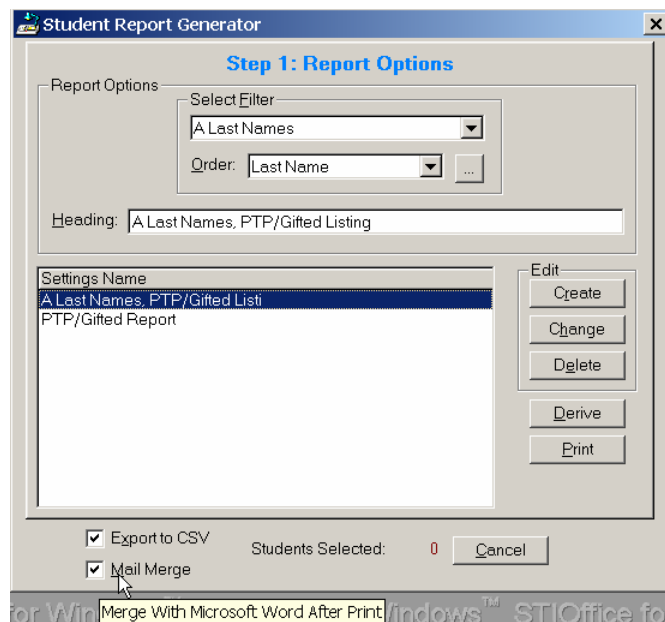
- Click **Print**.
- On the Report Designer menu, click **File** then **Close**.
- An *Export Report to CSV* dialog box will open.








- Select the datapath to which the file should be saved by clicking the **Ellipsis** button. Enter a file name. Checking *View CSV After Report* will open the default viewer (the program associates with .csv files). Click **OK**.
- After the report previews, close the door. The viewer will open.

Creating Customized Mail Merge Tags

- After selecting fields to print, check *Export to CSV* and *Mail Merge*.



- Click **Print**.
- Enter a location at which to save the report. Click **OK**.
- On the *Report Designer* menu, click **File** then **Close**.

- After the report finishes previewing, close the door. Microsoft Word® will open. On the *Mail Merge* toolbar, click the  (**Insert Merge Fields**) icon. . Use this icon to insert the merge tags into the document.
- When the document has been completed, select one of the *Merge to...* options:
 - **Merge to New Document**  (recommended)
 - **Merge to Printer** 
 - **Merge to E-Mail** 
 - **Merge to Fax** 

Note: If using **Merge to New Document**, a new word document will be created with one page per student. Print as normal.

Retrieving a Custom Report

To print an up-to-date version of a report that has already been created, select **Students | Students Reports | Custom Reports** and do the following:

- Choose a student filter.
- Enter a new *Heading* for the report desired; otherwise leave this field blank.
- Select the name of the report under the *Settings Name* section.
- Click **Print**.
- If the report designer appears, click **File** at the top left of the screen then click **Print**.

Modifying a Custom Report

There are two ways to modify an existing report, using either the **Change** button or the **Derive** button. **Change** will lose the original report. **Derive** allows the user to keep the original report and create a new report based on the existing one.

- At the *Custom Reports* screen, choose a student filter.
- Select the report to be modified in the *Settings Name* section.
- Click the **Change** or **Derive** button.
- Select or de-select the fields for the new report.
- If using **Derive**, Enter a unique name for the new report in the *Settings Name* field.
- Click the **Print** button.
- When the report designer appears, select **File** and then click **Print**.