

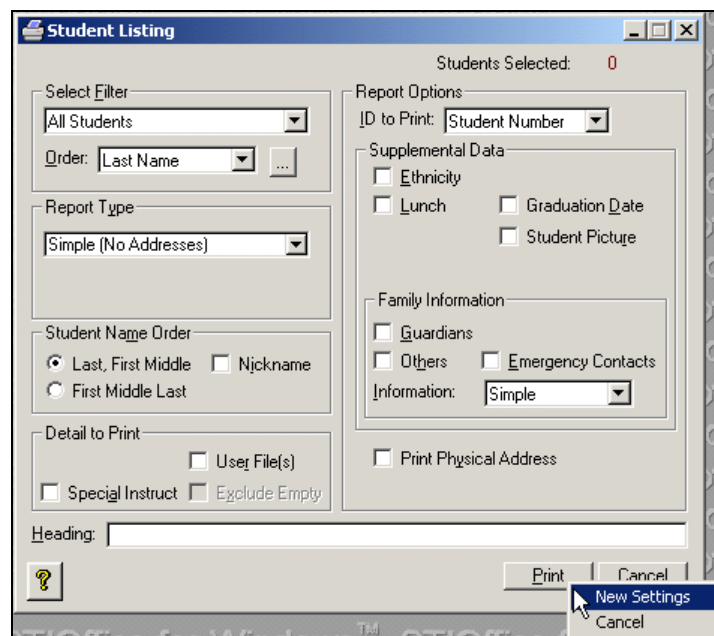
# STIOffice – Report Designer

## Using the Report Designer to Modify Report Settings

The *Report Designer* is used to customize a specific report. This feature is available for virtually all reports run in STIOffice.

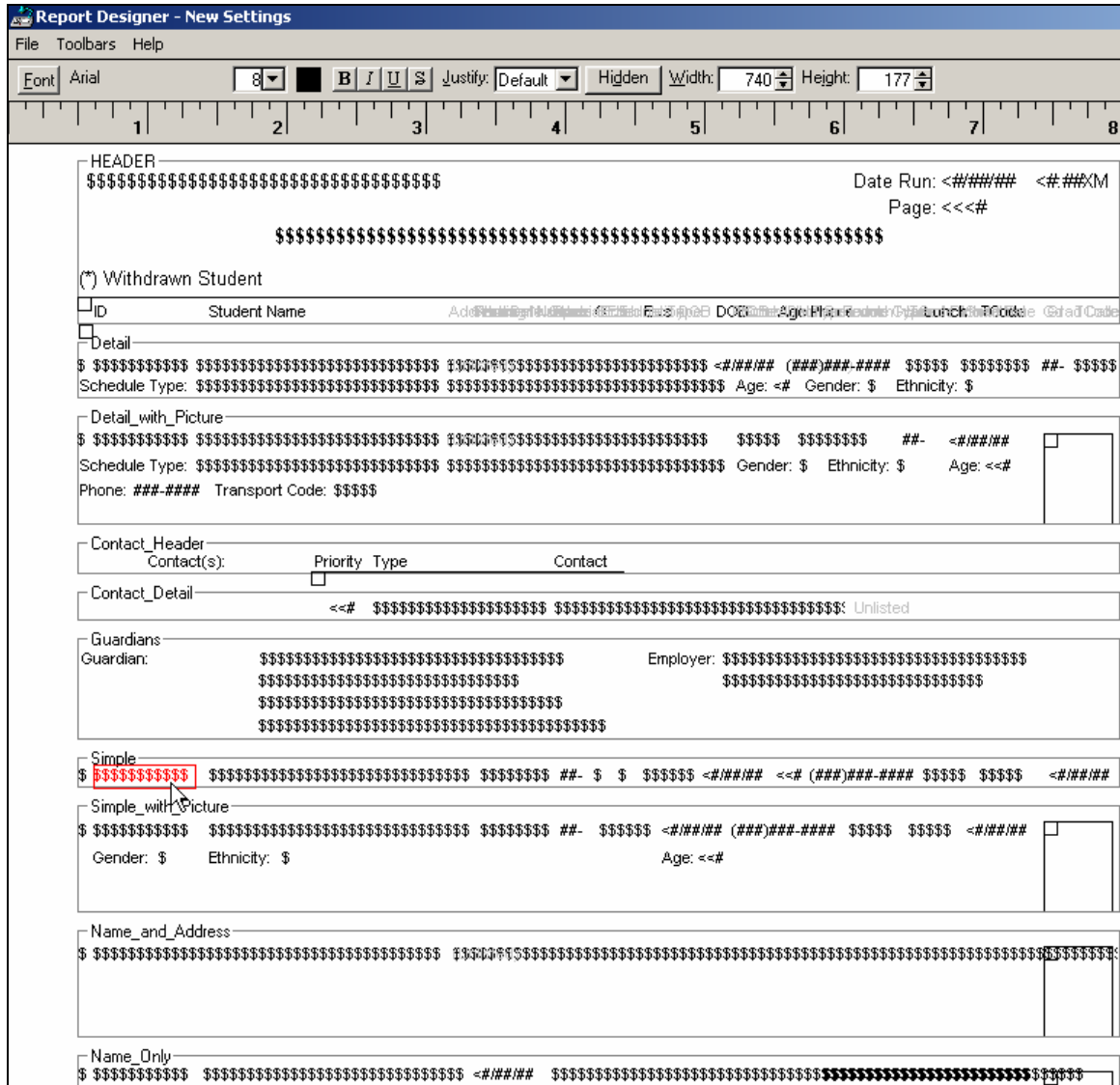
To use the report designer, select a report to change or modify. To demonstrate, a simple report will be used as an example: the *Student Listing*.

Select **Students | Student Reports | Listing** and then perform the following steps to customize the report:



1. Choose a filter. (Example: *All Students*)
2. Choose the *Order* in which students are to be printed.
3. Choose the *Report Type*. Different report types will display various information. It is recommended that you print a copy of the report using the normal settings before you customize these settings. For our example, we will select the *Simple (No Addresses)* report.
4. Continue selecting information to include on the report.
5. Right-click on the **Print** button and choose **New Settings**. The *Report Designer* will appear.

- Since the report type of *Simple* was selected in *Step 3* above, look at the *Simple* section of the report designer screen.



Hint: Placing the mouse pointer over a field will display a brief description of that field in the lower right hand corner of the screen. Find the field to hide or move. For example, choose *Phone* by placing the mouse pointer on the *Phone* field and then left-click once.

- To hide a field, click the field so that it appears in red and then click the **Hidden** button at the top of the report.
- When hiding any field that has a heading before it – such as *Age* – you should hide not only the word *Age* on the report but also the <# code. This will hide the student’s age on the report and will also prevent the word *Age* from printing on the report at all.
- At the top of the screen next to the *Student Name*, information is displayed in both *blue* and *black*. The *black* information is the headings for the report type you have chosen (i.e., if you were to choose a report type of *Locker Listing* in *Step 3* above, the line *Locker Number* will display in black). The *blue* information is for headings of all the other report types that have not been chosen. Therefore, only headings in black will need to be hidden. To move a blue heading, click on the blue information and drag it to another location. To hide the black heading, click on it, then click the **Hidden** button at the top of the screen.

10. Fields may be moved. However, fields may not be moved from one boxed section of the screen to another. To move a field, left-click on it and drag the field to its new location. Be sure to move the *heading* of the field as well as the *data* contained in the field.
11. To save the report, click **File** at the top left of the screen and then click **Save**.
12. Enter a description of the modified report in the *Name These Settings* box. An example would be *Simple Without Phone*. Click **OK** to save the description.
13. To print the report, click **File** and select **Print**. The example given above would now generate a Student Listing report without the phone numbers.

## Selecting a Modified Report

To re-run the report created in the example above, you would do the following:

1. Go to **Students | Students Reports | Listing**.
2. Choose the *Filter* and the report *Type* of *Simple (No Addresses)*.
3. Right-click on **Print** and choose the description entered when the report was saved (*Simple Without Phone*). Note that the report type selected in the previous step must be the same as the one selected when the new settings were created.

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## Changing a Customized Report

To change the settings of a report that has already been modified via the **Report Designer**, perform the following steps:

1. Open the report dialog. For example, go to **Students | Student Reports | Listing**.
2. Select the desired *Filter*, *Order* and *Report Type*.
3. Right click on the **Print** button and select **New Settings**.
4. In the *Report Designer* screen, click **File** and then click **Open**.
5. Choose a settings name from the list. Click **OK**.
6. Make changes. Click **File** and then click **Save**.
7. To generate the report, click **File** and select **Print**.

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## Deleting a Customized Report

To delete a customized report that was created via the **Report Designer**, perform the following steps:

1. Open the report dialog. For example, go to **Students | Student Reports | Listing**.
2. Select the desired *Filter*, *Order* and *Report Type*.
3. Right click on the **Print** button and select **New Settings**.
4. In the *Report Designer* screen, click **File** and then click **Delete**.
5. Choose a settings name from the list. Click **OK**.
6. Click **OK** to confirm deletion.
7. Click **File** and then select **Close**.