

Custom Reports Guide



SpEd Forms Inc.

Custom Reports

Any administrator can use the "Custom Reports" feature to export or print a specific report for data that is stored in their SpEd Forms database. Some administrative users may have limited access to some tables. They can, however, inquire with the Super Administrator who can provide access to a specific report that may be outside of their current limitations.

1.1 Creating a basic report

1. Navigate to the "Reports" menu.
2. In the "Custom" reports menu, click on "Select tables and fields".

NOTE: Super Administrators can choose "Write SQL statement" (this requires knowledge of SQL).

3. Type in a "Report name".
4. Under "Provide access to:", as an option you can share this report with all Teachers and/or School/District administrators.

NOTE: If you share this report with all "Teachers", it will show up in their (teacher) reports menu but the results will be automatically adjusted to only show records of students for which they are the case manager.

5. Under "Tables and fields:", select the table name from the drop down list (Super Administrators can select any table for the first table but all others are limited to the "student" table).
6. Select the field names in the box directly below the table name that you have selected in the drop down.

NOTE: To select multiple fields, hold down the CTRL key (PC) or the Apple key (Mac).

Help in determining the correct fields: For a list of the table and field names for each page of the IEP, click on the "IEP fields reference" link. The "Setup fields reference" shows the table and field names of each field on the student's "Edit Setup" page. In addition to these lists, a link appears on each of those pages that will show a graphic layout of each field listed on those pages, referenced by their numbered listing.

7. Toward the bottom of the "Tables and fields" section, several checkboxes have been provided for common additions to your layout (they're available only if the "student" table is included in your report).
 - a. When "Active students only" is checked, your results will automatically be limited to "Active" students (those that have not been exited or are currently receiving services).
 - b. When "Show case manager" is checked, the case manager's first and last name will automatically be included in the results of your report.
 - c. When "Show district" is checked, the student's serving district ID and name will automatically be included in the results of your report.
 - d. When "Show school" is checked, the student's serving school ID and name will automatically be included in the results of your report.
8. Be sure to "Save" your report after choosing information for your tables and fields.

Reports Custom Report Edit

Report name: Mailing Labels

Provide access to: Teachers School administrators District administrators

Tables and fields: student (selected)

Selected fields: addresssg1_city, addresssg1_county, addresssg1_postalcode, addresssg1_statepr, addresssg1_street_line1

Field order: student.nameg1_name, student.addresssg1_street_line1, student.addresssg1_city, student.addresssg1_statepr, student.addresssg1_postalcode

Filters:

Sort order: 1. student.nameg1_name Asc, 2. --Selectfield-- Asc, 3. --Selectfield-- Asc

Data preview:

nameg1_name	addresssg1_street_line1	addresssg1_city	addresssg1_statepr	addresssg1_postalcode
Brenda Brady	333 Christina road	St Paul	MN	55454
Carol Williams	207 4th St SW	Pipestone	MN	56164
David Fulton	7482 Dairy Avenue	Glencoe	MN	56336
John Andrews	4432 Sunnyside Hill	North Branch	MN	56056
Melissa Scott	1001 Prairie St.	Northfield	MN	56057

SQL:

```
select top 20
student.nameg1_name, student.addresssg1_street_line1, student.addresssg1_city,
student.addresssg1_statepr, student.addresssg1_postalcode
from student
where student.nameg1_name <> ' ' and student.addresssg1_street_line1 <> ' ' and
(student.marss_status<>'99' or student.marss_status is null)
order by student.nameg1_name asc
```

1.2 Using "Field order" to order the columns of your report

In the "Field order" section, you can alter the order in which the fields are displayed in the "Data preview" (or final report) by using the up or down arrows next to each field.

1. After saving, the selected fields will be listed under "Field order".
2. Click the double arrow at either side of the field name to move that field up or down in the list.

NOTE: Each time the "Field order" is changed, the page will be saved and the "Data preview" will be changed to reflect the new order.

1.3 Using "Filters" to modify your results

As an option, you can add "Filters" to modify the results in your custom report

1. In the "Filters" section, select the field name from the drop down list.
2. Next to that field name, select a condition from the next drop down list and then (if necessary) type in the value of your specific condition in the text box.

HINT: When using "like", the underscore (_) and the percent sign (%) can be used as wild cards. The underscore represents only one character and the percent represents spaces or any character(s). For example: **br_n** could match **bran, bren** or **brin**. **br%n** would not only match **bran, bren & brin** but also **brawn, brian, brighton, brown, brynn**, etc. **Jo%** could be used if you are looking for someone named **John** but are not sure if their first name is **Jon, John, Johnny, Jonathan** or even **John Paul**.

3. In between each "Filter" option, the "and" & "or" feature can be used to combine those filters in a specific way. While using "and" between two filters would ensure that the results comply with both of those conditions, "or" would simply show all results for either of those condition.

HINT: When creating a report to show services for a specific date range one might use the option of "**and**" between filters of [...start_date >= 7/1/2008] and [...start_date <= 6/30/2009]. When creating a report to show students that are in "Third grade", "Fifth grade" or "Eight grade" one might use the option of "**or**" between filters of [...grade = 03] or [...grade = 05] or [...grade = 08].

4. Be sure to "Save" your report after adding or changing information in the "Filters" section.

1.4 Using the "Sort order" to order your results

As an option, you can use the "Sort order" to list the results of your custom report in a specific way.

1. In the "Sort order" section, select the field name from the drop down list.
2. Next to that field name, select either "Asc" (ascending) or "Desc" (descending) from the next drop down list.

NOTE: The first "Sort order" takes precedence over the second and the second over the third. For example: if you order a list of students by "last name" (first) and "first name" (second), the list of students will be sorted by "last name" and if students have the same "last name" then they will be sorted by "first name".

3. Be sure to "Save" your report after adding or changing information in the "Sort order" section.

1.5 Using the "Data preview" to confirm your results

The "Data preview" is limited to the top 20 results so that you can see a sample of your data without it taking too long to display.

1. After your report is "Saved", the results can be immediately viewed in the "Data preview" section.
2. You can choose to turn off the "Data preview" by unchecking the checkbox just above that section.
3. You can view the full report by clicking on the "View complete report>>" link and you will always have an opportunity to navigate back to this edit screen.

A practical EXAMPLE is included on the following page.

EXAMPLE: Export (Parent/Guardian) names to make mailing labels in Microsoft Excel.

1. Navigate to the "Reports" menu and click on "Select tables and fields" under Custom reports.
2. Name the report, select the "student" table (if applicable) and then select the following fields:
CA users: student.addressg1_street_line1, student.addressg1_city, student.addressg1_statepr, student.addressg1_postalcode, student.nameg1_firstname and student.nameg1_lastname
MN users: student.addressg1_city, student.addressg1_postalcode, student.addressg1_statepr, student.addressg1_street_line1 and student.nameg1_name
3. Click on the "Save" button to save your changes.
4. Change the "Field order" to the following sequence:
CA users: firstname / lastname / address / city / state / zip
MN users: name / address / city / state / zip
5. Set the "Sort order" to the following:
CA users: 1. student.nameg1_lastname (Asc) 2. student.nameg1_firstname (Asc)
MN users: 1. student.nameg1_name (Asc).

NOTE: When choosing a number of fields, your search results may include several blank records. In the example we saved a "Filter" for the parent/guardian name with a "condition" of "Not =" and typed a space [*spacebar*] into the "value" field (so that any fields that were empty would not be displayed in the final report). You could also add the same type of condition to other fields (if necessary).

6. After saving the report for the last time, click "View complete report>>".
7. When the table of results are displayed, click on "Save to File" and then click on "Save" to save the file.

The file can then be opened in Microsoft Excel and a layout can be created to accommodate your mailing label sheets.

1.6 Create/Edit a report through the "Write SQL statement" interface (Super Administrators only)

1. Navigate to the "Reports" menu.
2. In the "Custom" reports menu, click on the "Write SQL statements" link to create a new report or click on the "Edit SQL" link next to the report you want to edit.
3. You will then have an opportunity to change the "Report name" or the wording of the "SQL statement" (knowledge of SQL is required).
4. Optional setting can be chosen to provide access (of this report) to specific groups of administrative users. To allow all teachers to view this custom report from their "Reports" menu, put a check in the checkbox next to "All teachers".

The screenshot shows the 'Reports Custom Report Edit SQL' interface. At the top, there is a header with a Minnesota map icon, the title 'Reports Custom Report Edit SQL', and buttons for 'Save', 'Reports', and 'Menu'. Below the header, there are links for 'IEP fields reference' and 'Setup fields reference'. The 'Report name' field contains 'Mailing Labels'. The 'SQL statement' field contains the following SQL code:

```
select
student.nameg1_name, student.addressg1_street_line1, student.addressg1_city,
student.addressg1_statepr, student.addressg1_postalcode
from student

where student.nameg1_name <> ' ' and student.addressg1_street_line1 <> ' '
and (student.marss_status<>'99' or student.marss_status is null)
order by student.nameg1_name asc
```


Below the SQL statement, there is a section titled '(Optional) Provide access to administration users in:' with four checkboxes: 'All districts', 'All schools', 'All teachers', and 'Show data preview'. The 'All teachers' checkbox is checked. There are also dropdown menus for 'District' and 'School'.

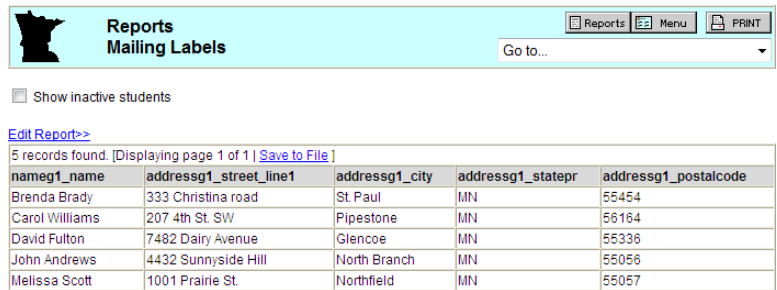
NOTE: The options for "All districts", "All schools" and "All teachers" will only be available if the "student" table is present in your SQL statement.

5. Be sure to click on the "Save" button when you are finished making changes.

1.7 View a custom report

1. Navigate to the "Reports" menu.
2. In the "Custom" reports menu, click on the name of any report.
3. The report will be displayed and often times broken into several pages (Displaying 1 of 3, for instance). Click on the (number) link to view other pages of the report.

NOTE: If you are the creator of this report, an "Edit..." link will be available just above the results table. Click on this link to edit the report.

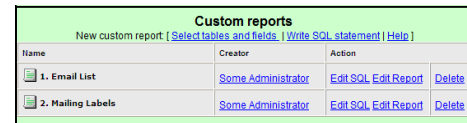


The screenshot shows a web interface for 'Reports Mailing Labels'. At the top, there is a navigation bar with a Minnesota state icon, the title 'Reports Mailing Labels', and buttons for 'Reports', 'Menu', and 'PRINT'. Below the navigation bar, there is a search box with the text 'Go to...' and a dropdown arrow. A checkbox labeled 'Show inactive students' is present. Below this, there is a link 'Edit Report>'. The main content is a table with 5 records found, displaying page 1 of 1, and a 'Save to File' link. The table has the following columns: nameg1_name, addressg1_street_line1, addressg1_city, addressg1_statepr, and addressg1_postalcode.

nameg1_name	addressg1_street_line1	addressg1_city	addressg1_statepr	addressg1_postalcode
Brenda Brady	333 Christina road	St. Paul	MN	55454
Carol Williams	207 4th St. SW	Pipestone	MN	56164
David Fulton	7482 Dairy Avenue	Glencoe	MN	55336
John Andrews	4432 Sunnyside Hill	North Branch	MN	55056
Melissa Scott	1001 Prairie St.	Northfield	MN	55057

1.8 Edit/Delete a custom report

1. Navigate to the "Reports" menu.
2. Access the "Custom" reports menu.
3. To edit the report that was created via the "Select tables and fields" interface, click on the "Edit Report" link (if available).
4. To edit the report through the "Write SQL statement" interface, click on the "Edit SQL" link.



The screenshot shows a 'Custom reports' management interface. At the top, there is a title 'Custom reports' and a subtitle 'New custom report [Select tables and fields | Write SQL statement | Help]'. Below this is a table with columns 'Name', 'Creator', and 'Action'. There are two reports listed: '1. Email List' and '2. Mailing Labels'. Each report has a 'Delete' link in the 'Action' column.

Name	Creator	Action
1. Email List	Some Administrator	Edit SQL Edit Report Delete
2. Mailing Labels	Some Administrator	Edit SQL Edit Report Delete

NOTE: Once you edit the SQL statement through the "Write SQL statement" interface, the report can no longer be edited through the "Select tables and fields" interface (even if it was originally created through that interface).

4. To delete one of the custom reports, click on the "Delete" link next to the name of the report you want to delete.