

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. Cooperative, District and School 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 do not have EXIT... for their "Status" or for their "Status End (Exit Reason)").
 - 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

Go to... [Save] [Reports] [Menu]

[IEP fields reference](#)
[Setup fields reference](#)

Report name: Mailing Labels

Provide access to:
 Teachers School administrators District administrators

Tables and fields:
 To select multiple fields hold the CTRL (PC) or Apple (Mac) button.

student | addressg1_city (nvarchar) | addressg1_county (nvarchar) | addressg1_postalcode (int) | addressg1_statepr (nvarchar) | addressg1_street_line1 (nvarchar)

Sort order:
 student.nameg1_name
 student.addressg1_street_line1
 student.addressg1_city
 student.addressg1_statepr
 student.addressg1_postalcode

Filters:

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

Show data preview [View complete report>](#)

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	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.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

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 with disabilities of "Deaf-hard of hearing", "Visually impaired" or "Deaf-blind" one might use the option of "**or**" between filters of [...disability1 = 05] or [...disability1 = 06] or [...disability1 = 09].

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), select the following fields: student.addressg1_city, student.addressg1_postalcode, student.addressg1_statepr, student.addressg1_street_line1 and student.nameg1_name.
3. "Save" your changes.
4. Change the "Field order" to name/address/city/state/zip.
5. Set the first "Sort order" to student.nameg1_name.

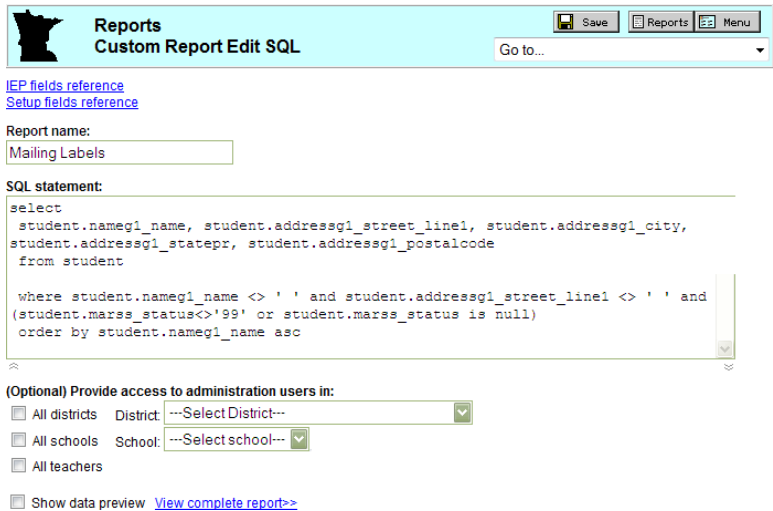
NOTE: When choosing a number of fields, your search results may include several blank records. In the example we saved a "Filter" for *nameg1_name* with a "condition" of "Not =" and typed a space [spacebar] into the "value" field (so that any fields that were empty would not be displayed in the final report). You could also add the same conditions for *addressg1_street_line1* if there are blank addresses.

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. Under "Custom reports", 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".



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. Under "Custom Reports", 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 toward the top of the report. Click on this link to edit the report.

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. To edit the report that was created via the "Select tables and fields" interface, click on the "Edit Report" link (if available).
3. To edit the report through the "Write SQL statement" interface, click on the "Edit SQL" link.

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.

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