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## 1 Reporting

The following topics are treated in this section:

- Report Selection Options
- Parameter and Data Values
- Report Formats
- Printing Reports

### 1.1 Introduction

Many reports, which have been designed according to specific business requirements, are available within QuercusPlus. In this section, rather than attempting to describe each report, the various ways in which reporting is approached are addressed in a general way.

A **Reports** menu option is to be found either directly under the main menu option or as a deeper sub-menu option. The purpose and contents of a given report can be deduced from the title of the corresponding menu option and its position within the menu structure (see section 1.2).

Some reports are parameterised; this means that they are generated from templates (output objects) which specify the data fields to be included. In such cases the values of the parameters must be available; depending on the context, some of these may already be known to the system; typically some parameter values will need to be chosen or supplied (see section 1.3).

*Output Objects and corresponding Reporting Parameters are described in the [QuercusPlus Reporting Guide](#), which is aimed at report writers and support staff.*

Reporting screens may include descriptions of the options presented e.g.



Some include instructions e.g.

To include the field in the Selection Criteria for label Production check the box beside the Field and insert the value.

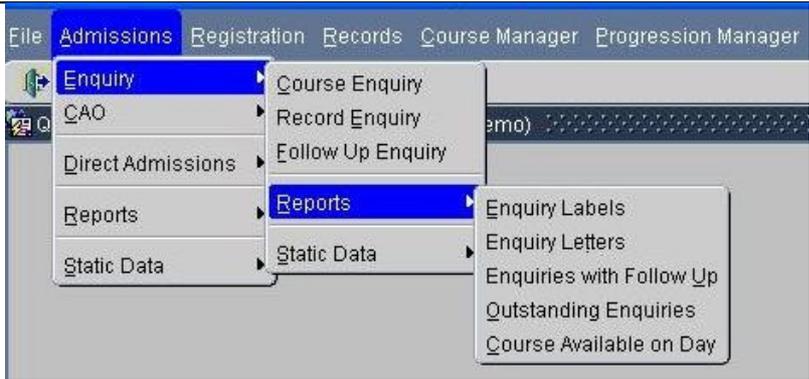
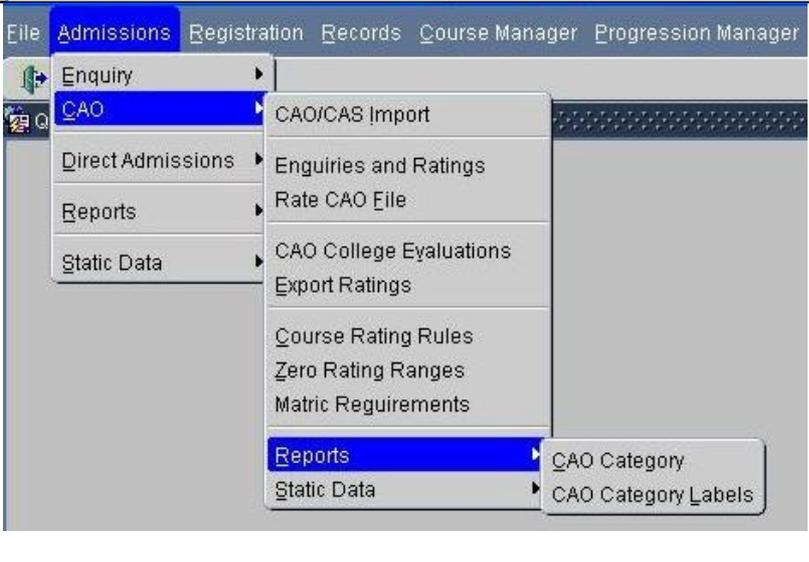
Un-checking the check box will remove the field from the Selection Criteria

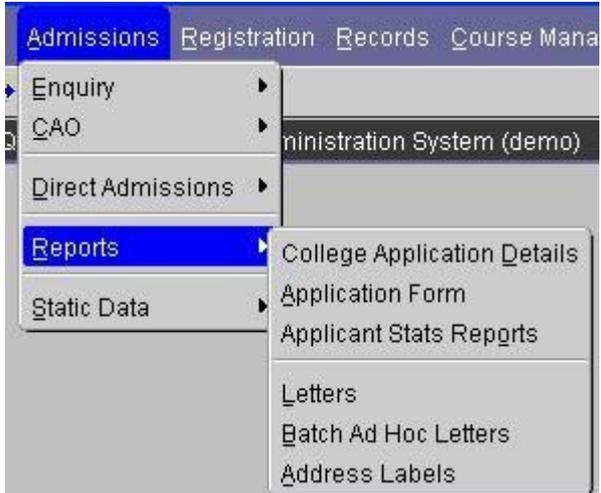
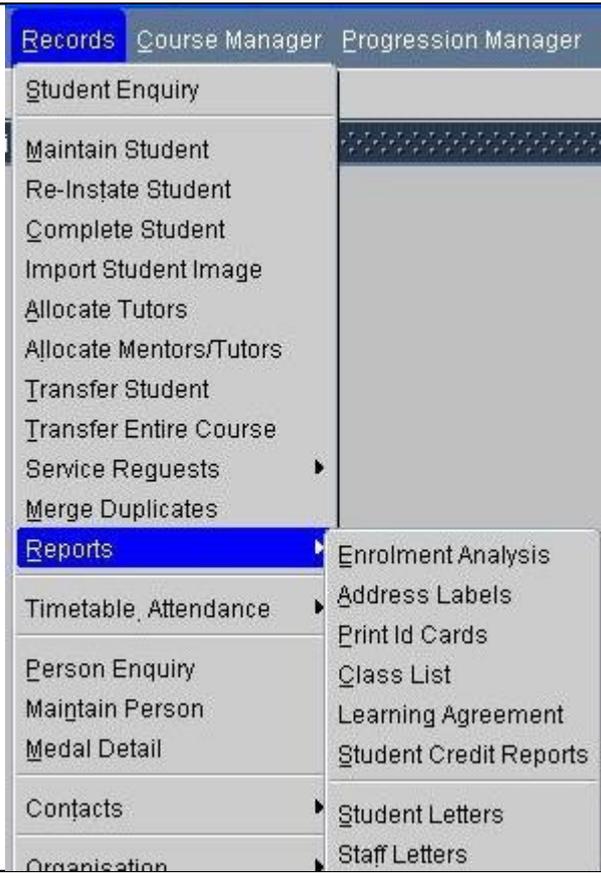
Academic Session is always included if not null.  
Time is included if not null

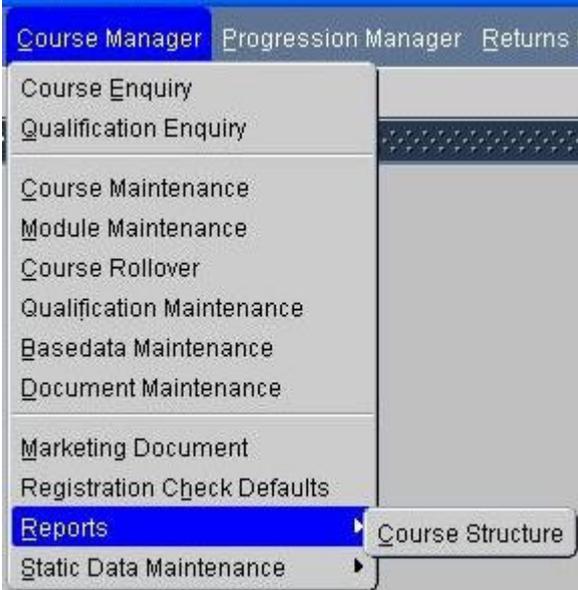
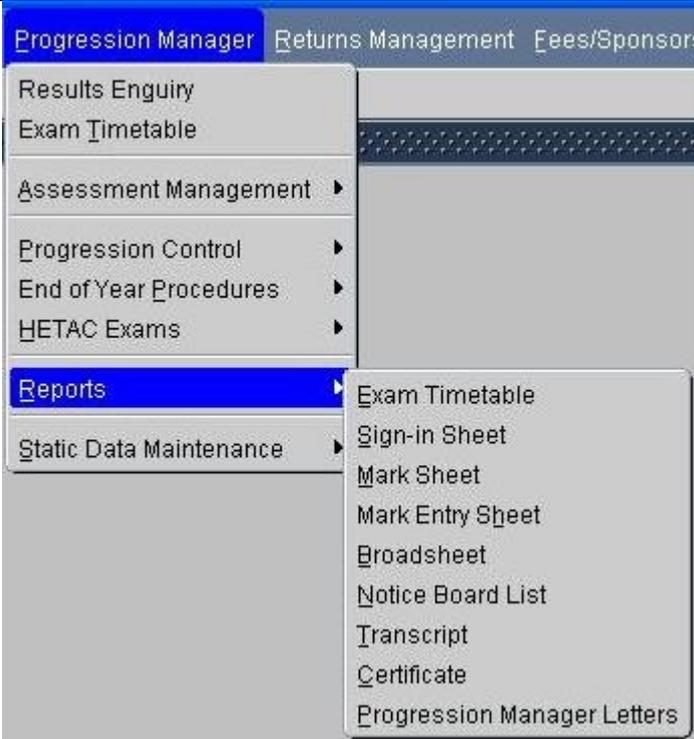
When Complete Press the Print Button

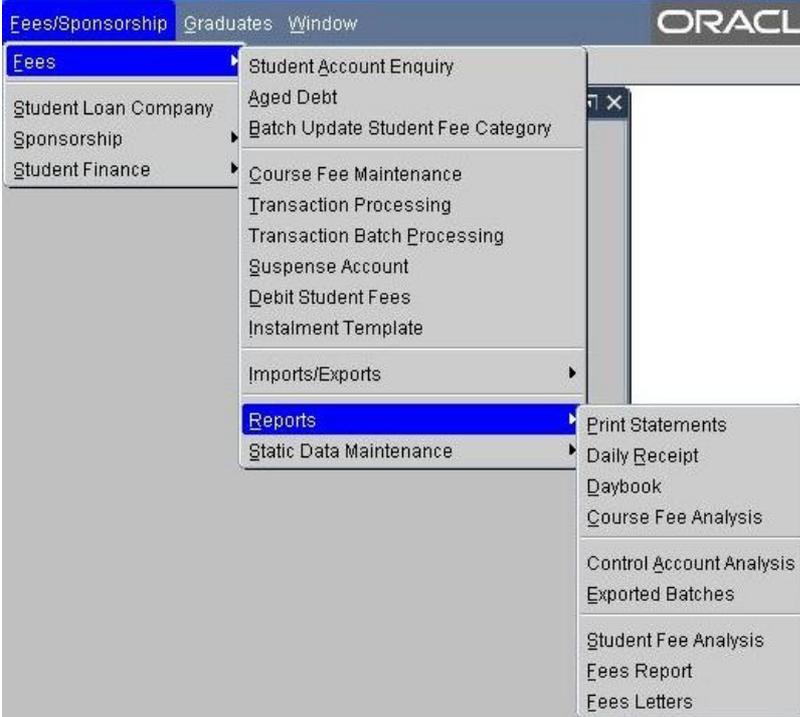
## 1.2 Location of Report Sub-menus

At the time of writing, the following screen captures represent the reporting menu options available in QuercusPlus v2.

Main Menu Option	Reports Sub-menu
Admissions	
Admissions	

Main Menu Option	Reports Sub-menu
Admissions	
Records	

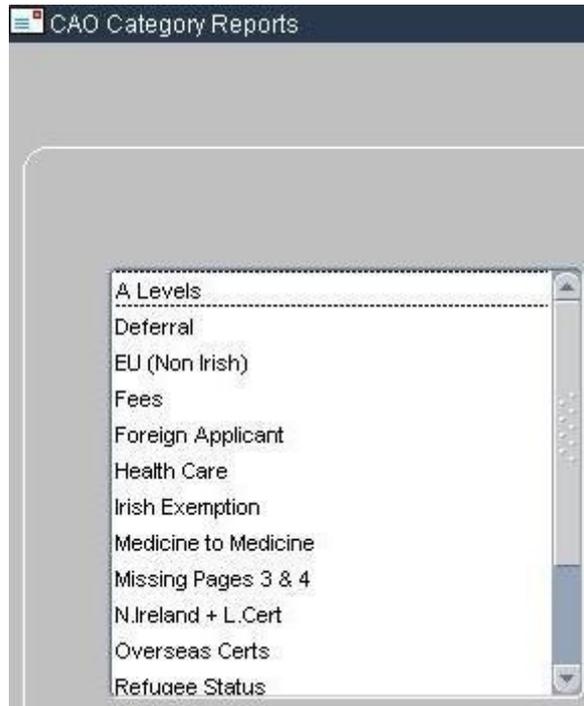
Main Menu Option	Reports Sub-menu
Course Manager	 <p>The screenshot shows the 'Course Manager' sub-menu with the 'Reports' option highlighted. The 'Reports' sub-menu is open, displaying the following items: Course Enquiry, Qualification Enquiry, Course Maintenance, Module Maintenance, Course Rollover, Qualification Maintenance, Basedata Maintenance, Document Maintenance, Marketing Document, Registration Check Defaults, Reports (highlighted), and Static Data Maintenance. The 'Reports' sub-menu is further expanded to show: Course Structure.</p>
Progression Manager	 <p>The screenshot shows the 'Progression Manager' sub-menu with the 'Reports' option highlighted. The 'Reports' sub-menu is open, displaying the following items: Results Enquiry, Exam Timetable, Assessment Management, Progression Control, End of Year Procedures, HETAC Exams, Reports (highlighted), and Static Data Maintenance. The 'Reports' sub-menu is further expanded to show: Exam Timetable, Sign-in Sheet, Mark Sheet, Mark Entry Sheet, Broadsheet, Notice Board List, Transcript, Certificate, and Progression Manager Letters.</p>

Main Menu Option	Reports Sub-menu
Returns Management	 <p>           Returns Management &gt; Fees/Sponsorship &gt; Graduates &gt; Window            ILR &gt;            ISR &gt;            HESA &gt; Defaults            HEA &gt; Export                      Student HESA                      Update Classification            Reports &gt; HESA / Quercus Differences Report            NCB Static Data            Credit Bearing Static Data         </p>
Fees/Sponsorship	 <p>           Fees/Sponsorship &gt; Graduates &gt; Window            Fees &gt; Student Account Enquiry                      Aged Debt                      Batch Update Student Fee Category            Student Loan Company            Sponsorship &gt; Course Fee Maintenance                              Transaction Processing                              Transaction Batch Processing                              Suspense Account                              Debit Student Fees                              Instalment Template            Student Finance                      Imports/Exports            Reports &gt; Print Statements            Static Data Maintenance &gt; Daily Receipt                                              Daybook                                              Course Fee Analysis                                              Control Account Analysis                                              Exported Batches                                              Student Fee Analysis                                              Fees Report                                              Fees Letters         </p>
Fees/Sponsorship	 <p>           Fees/Sponsorship &gt; Graduates &gt; Window            Fees &gt;            Student Loan Company            Sponsorship &gt; Sponsorship Maintenance                              Maintain Sponsors Invoice            Student Finance            Reports &gt; Print Statements            Static Data Maintenance &gt; Reports         </p>

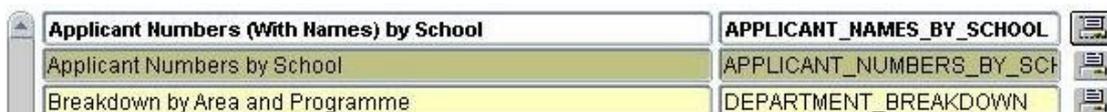
### 1.3 Report Selection Options

The various ways in which reports can be selected are set out in this section.

- Selection from a list box e.g.

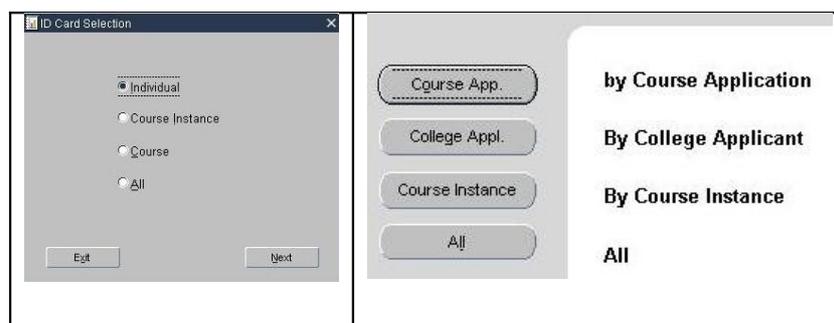


- Selection from a list of records e.g.



In the above example the print button corresponding to the required report is pressed.

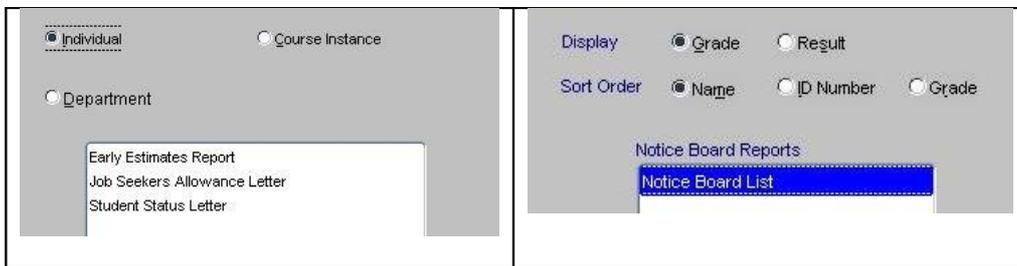
- Selection of report category via button or radio button prior to selection of an instance of the chosen category and then the report e.g.



In the above example, if any category except **All** is selected a further screen for selection of course, course instance etc. will be displayed before a final report selection screen is presented e.g.

Description	Report Name
Acknowledgement Letter	ACKNOWLEDGEMENT_LETTER
Follow Up Letter	FOLLOW_UP
Not in Order Letter	NOT_IN_ORDER

- Combined selection of options and report e.g.



The screenshot shows a form with the following elements:

- Radio buttons for selection:  Individual,  Course Instance,  Department.
- A list of reports: Early Estimates Report, Job Seekers Allowance Letter, Student Status Letter, and Notice Board Reports.
- Under 'Notice Board Reports', 'Notice Board List' is highlighted in blue.
- Additional options: 'Display' with radio buttons for Grade and Result; 'Sort Order' with radio buttons for Name, ID Number, and Grade.

## 1.4 Parameter and Data Values

The various data selection options and the ways in which they are presented are set out in this section. Parameter forms will be used for reports based on output objects. Data values are also entered directly into fields.

- Text fields for specification of textual or numeric selection criteria e.g.

Outstanding For  
No. Of Days

- Radio buttons to choose one of a set of selection criteria e.g.

Course available  
on other days  Yes  No

- Check boxes to choose one or more selection criteria.
- Dropdown lists to choose selection criteria e.g.

Field of Study

Course

- Use of checkboxes to include or exclude selection criteria e.g.

Source of Enquiry	<input type="text"/>	Classification	<input type="text"/>
Enquiry Action	<input type="text"/>	Enquiry Type	<input type="text"/>
Country	<input type="text"/>	Operator	<input type="text"/>
County	<input type="text"/>	Enquiry Date	<input type="text"/>
Field Of Study	<input type="text"/>	Year of Exam	<input type="text"/>
Mode of Study	<input type="text"/>		

➤ Use of parameter forms e.g.

**Parameter Form** ?

Not all parameters are required by all letters

Report Format:

Sender's Name <input type="text" value="Quercus Quercus"/> Email <input type="text"/> Course Level <input type="text"/> Status <input type="text"/> Tutor <input type="text"/> Location <input type="text"/> Reprint From <input type="text"/>	Department - free text <input type="text"/> Telephone Number <input type="text"/> Start Date <input type="text"/> Start Time <input type="text"/> Category <input type="text"/> Pay By <input type="text"/> To <input type="text"/> School Attended <input type="text"/>	Academic Title <input type="text"/> End Date <input type="text"/> End Time <input type="text"/> Order By <input type="text"/> Notes - free text <div style="border: 1px solid gray; height: 100px; width: 100%;"></div>
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In some reports – as in the above example – many of the parameter values will already be known to the system and cannot be changed.

Academic Session:

Start Date:  End Date:

Exam Series:

UAB:

Centre No.:

Withdrawals:  Check to Exclude

GNVQ:  GNVQ SA1

Option Code:

Module Code:

Student:

Course:

## 1.5 Report Formats

In general the *layout* of a given report has been designed according to its purpose. Some reports are simply a list of records e.g.

Class List

2005    A01-ATTEND GRPS    Critical Reading

Id Number	Surname	First Name	Course Code	Year	Registration Status
00113484	JONES	MARK	A01	1	REGISTERED
00113506	JOHNSON	BEHJAMIN	A01	1	REGISTERED
00113492	LOGKREY	ROGER	A01	1	REGISTERED
00113875	HAWORTH	VICTORIA	A01	1	REGISTERED
00114286	PETTERSON	JOHN	A01	1	REGISTERED
00114294	SHERIDAN	JOHN	A01	1	REGISTERED
00114677	ANDERSON	PETER	A01	1	REGISTERED
00114871	JONES	PETER	A01	1	REGISTERED
00115088	MCCOY	TONY	A01	1	REGISTERED
00115479	GERAGHTY	BARRY	A01	1	REGISTERED
00115487	EDDERY	PATRICK	A01	1	REGISTERED

Typically the *format* in which a report is produced can be selected from a list. The following formats are supported:

- ASCII
- Bitmap
- Delimited
- HTML
- HTML CSS
- PDF
- RTF
- XML

## 1.6 Printing Reports

Having selected and/or generated a report typically a *print* button (such as **Print** or  or ) will need to be pressed. In the case of parameterised reports the record management menu will be replaced by a report menu such as follows:



Buttons:

- : Print
- : Cancel