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1 Reporting

The following topics are treated in this section:

- Report Selection Options
- Parameter and Data Values
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- 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.
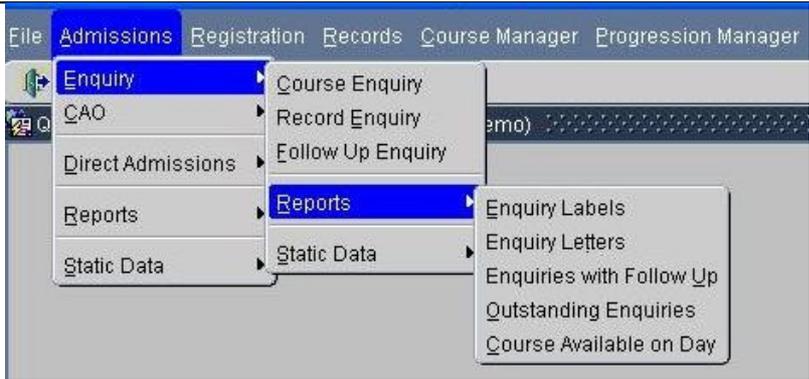
Un-checking the check box will remove the field from the Selection Criteria
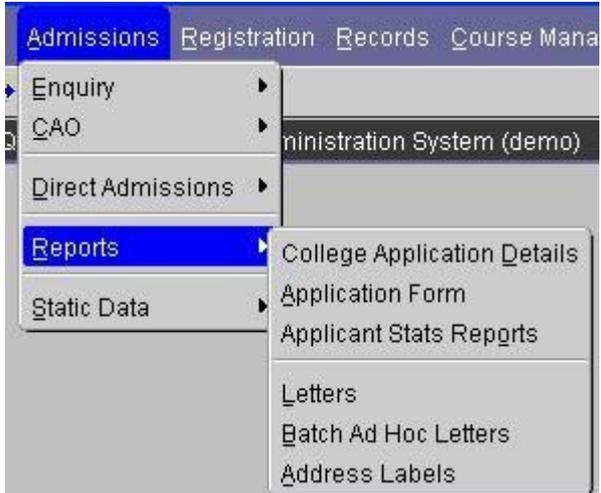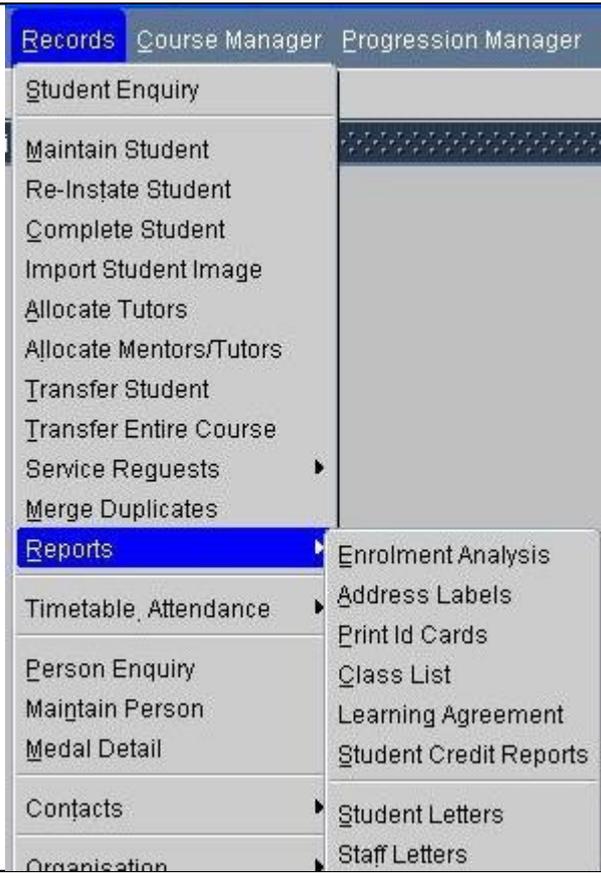
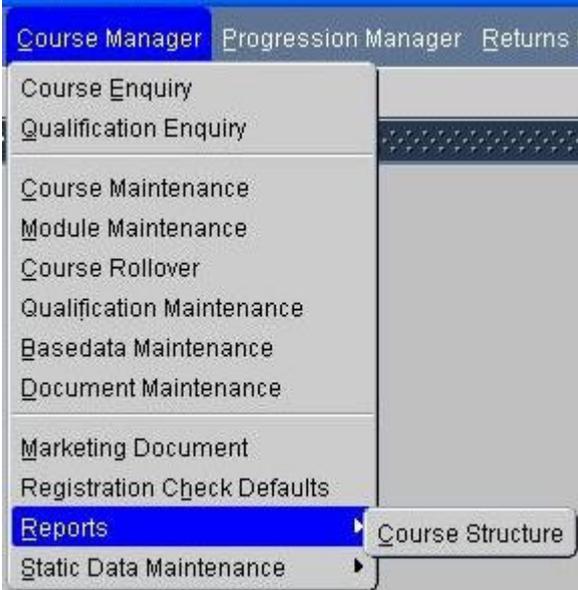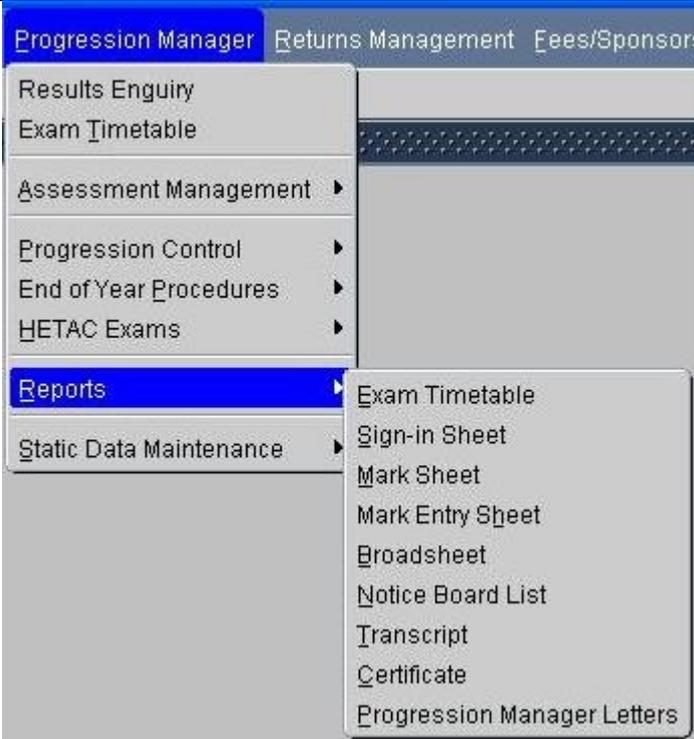Academic Session is always included if not null.
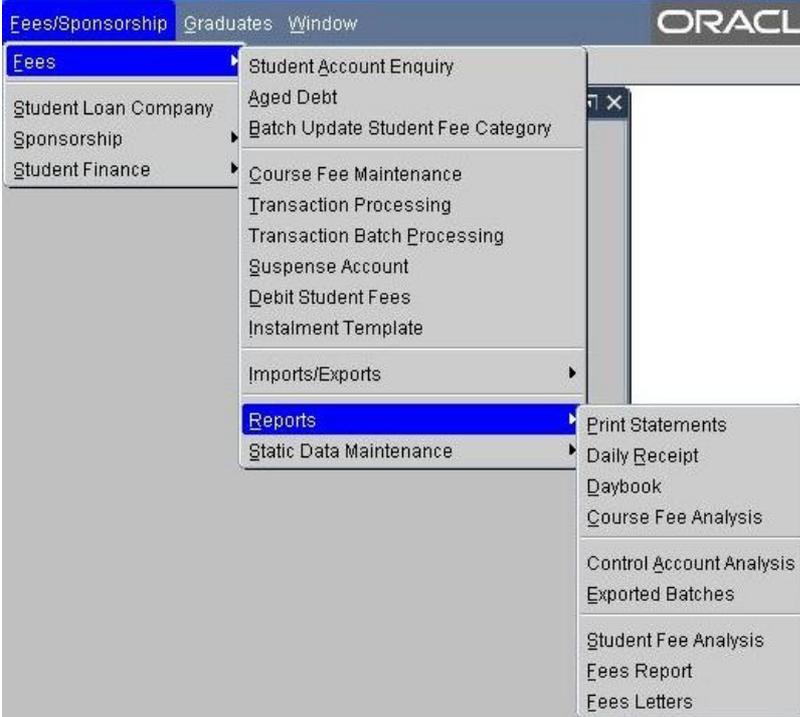Time is included if not null

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	
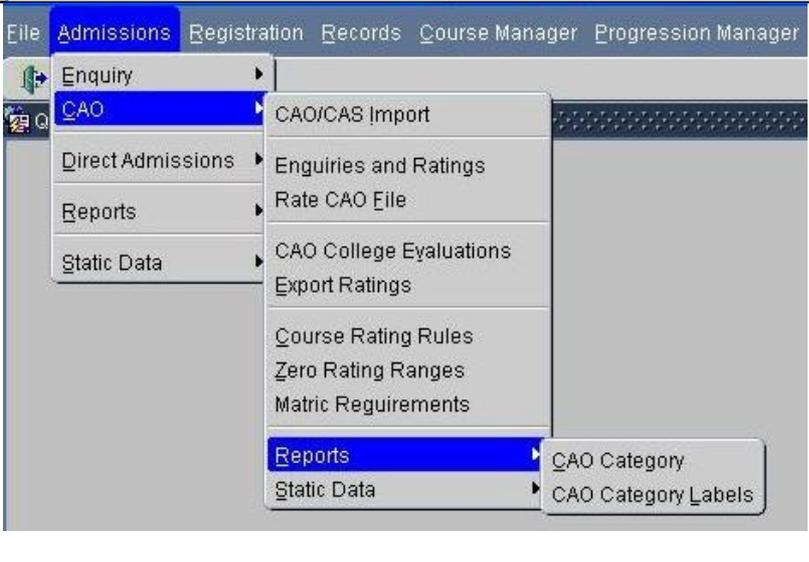
Main Menu Option	Reports Sub-menu
Admissions	
Records	

Main Menu Option	Reports Sub-menu
Course Manager	
Progression Manager	

Main Menu Option	Reports Sub-menu
Returns Management	
Fees/ Sponsorship	
Fees/ Sponsorship	

1.3 Report Selection Options
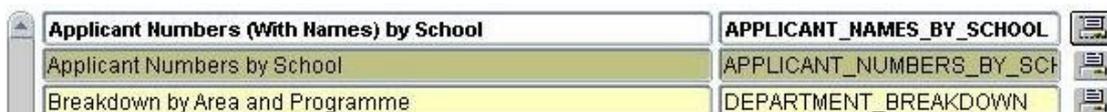
The various ways in which reports can be selected are set out in this section.
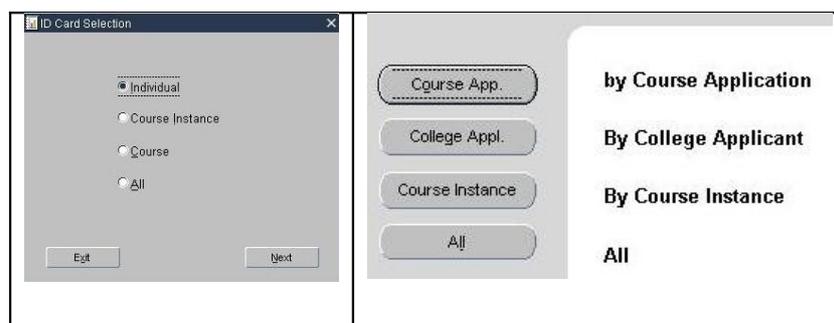
➢ Selection from a list box e.g.
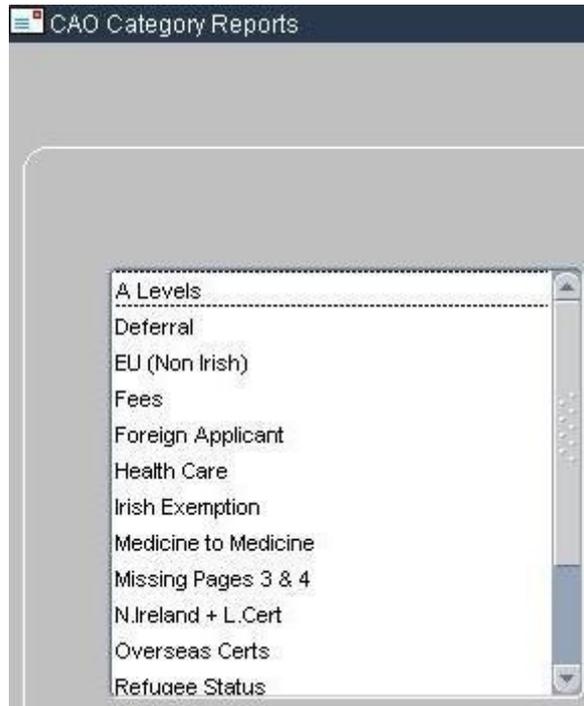
➢ Selection from a list of records e.g.

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.
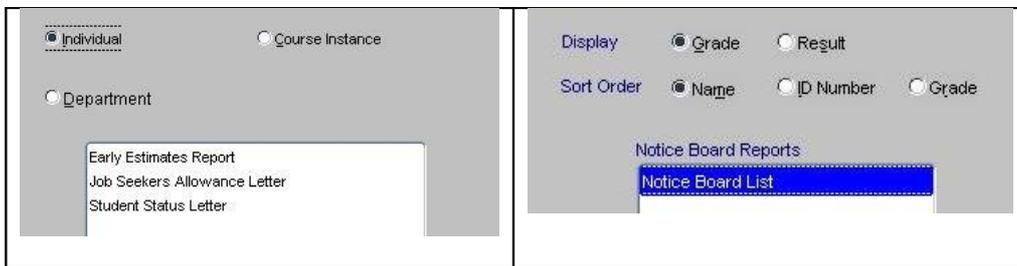
1.4 Parameter and Data Values

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 vales are also entered directly into fields.

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

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

➢ Check boxes to choose one or more selection criteria.

➢ Dropdown lists to choose selection criteria e.g.

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

> ➢ Use of parameter forms e.g.

In some reports – as in the above example – many of the parameter values will already be known to the system and cannot be changed.

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.

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

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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:

- ➤ [icon] : Print
- ➤ [icon] : Cancel