Training Course Agenda.

Reporting - Basic

Bromcom

No.1 Choice for Cloud MIS & Finance

Introduction

Target Audience

The **Reporting - Basic** training is recommended for delivery to the following people from your school:

- ✓ Data Manager
- ✓ General Administration staff who have a need for producing custom reports

Facilities/Requirements

For **Onsite Training**:
Using the means provided by the establishment for example a whiteboard or projector, the trainer will deliver a session for the module being trained on. An internet connection will be required.

In some instances, attendees will be able to login to follow along with the session, this will be arranged beforehand and in this case login information will be supplied.

For **Webinar Training**:
This session will be delivered via an internet connection, you will be sent a link and login details in an e-mail. We ask that you test the link before the session to make sure you have access, if you do not your IT support should be able to help you with this. If you still cannot connect please let us know as soon as you can, we will try to help or arrange an alternative method to deliver the training.

Objectives of Session & Timings

The Attendees will work together with their trainer to learn about the host of features within the module being trained and how best they can take advantage of these.

These sessions will teach you how to operate and manage your Bromcom MIS on a day-to-day basis.

Agenda Overview

Part One: Built-in Reports

✓ Using Built-in Reports
  o Parameters/Preview/Export/Print Options
  o Scheduling (inc. Scheduled Reports)
  o Saving as a Favourite
  o Exporting to the DMS (inc. My Documents/My Reports)
  o Data Export (raw data)

✓ Student/Staff List Page
  o Add/Remove Additional Columns
  o Search Filters/Additional attributes
  o Filtering/Sorting
  o Exporting

Part Two: Reporting Homepage

✓ View Reports
  o Report Folders (inc. Adding, Editing and Permissions)
  o Adding Reports to a Module Homepage
  o Online Report Repository (inc. converting reports)
  o How to run a saved report
  o Actions (inc. how to edit/delete/import/export

Part Three: Producing a Basic Quick Report

✓ Reporting Design Permissions
✓ Creating a Basic Quick Report
  o Student Basics Report Domain
  o Understanding data items and filters (inc. numerical/text based column level filters)
  o Advanced Mode – hide/delete columns in bulk
✓ Saving a Report (inc. role permissions)
✓ Exporting a Report to Excel
✓ Scheduling a Report

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