

# Training Course Agenda.

Reporting



# Introduction

## Target Audience

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

- ✓ Data Manager
- ✓ Member(s) from your Attendance, Administration and Curriculum Team
- ✓ General Office 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
  - Parameters/Preview/Export Options (including My Reports/My Documents)
  - Scheduling
  - Saving as a Favourite
- ✓ Student/Staff List Page
  - Add/Remove Additional Columns
  - Filtering/Sorting
  - Exporting

## Part Two: Producing a Quick Report

- ✓ Selecting a Report Domain
- ✓ Understanding Report Creation
  - Data Items
  - Filters
  - Layout
- ✓ Advanced Mode
  - Summary Columns
  - Calculated Columns
  - If then Else Columns
- ✓ Matrix Mode
- ✓ Saving a Report including allocating Role Permissions
- ✓ Exporting a Report to Excel
- ✓ Running a previously saved Report
- ✓ Scheduling a Report

## Part Three: Producing a Mail-Merge Report

- ✓ Using the Quick Report Webmerge to produce letters
- ✓ How to email letters home to parents

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## Part One: Built-in Reports

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## Part Two: Producing a Quick Report

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