



SchoolMAX

Report Ordering

User Guide

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OVERVIEW

The Report Ordering module of SchoolMAX is a powerful and comprehensive report management tool that allows users the ability to generate basic and complex reports from SchoolMAX data. System-wide report templates can be configured to define specific data selection and custom sort sequences of the data. In addition, reports can be output to custom forms and even emailed. The data extracted to the reports is real-time and updates with each subsequent report request. The system also provides the ability to track and report the status of all report requests. All customized reports can be saved with a unique sequence (version) number and secured by the report creator. The Auto Screens feature within Report Ordering easily guides users through the process necessary to define custom reports.

There are five steps to Report Ordering that will be discussed in this manual. If report templates have been copied and/or customized, users may skip to the section on *Request a Report*. Additional information can be obtained from the Administrator Documentation Guides, which may be offered online by your district. These guides also include a detailed description and sample of each available report and can be found at the following URL:

Online Documentation Address: <http://www.ri.net/RINET/products/sis/reportdocs.html>

KEY TERMS

The following key terms are used in Report Ordering

- **Global template:** The master copy of the report. Global templates cannot be customized and must be copied to a user-selected sequence (version) number before they can be changed.
- **Template:** The customized version of the global template, saved by the user with a unique sequence (version) number.
- **Sequence number:** A unique number chosen by the user to identify his/her particular version.
- **Sorts:** Variables that can be manipulated to customize a template. Sorts indicate the *order* in which the data will print.
- **Includes/Excludes:** Variables that can be manipulated to customize a template. Includes/Excludes are similar to filters that are enabled to determine *what* data will print.
- **Parameters:** A set of unique variables within the report that determine the guidelines of the data available within the module.

SchoolMAX Main Menu

SchoolMAX - Student Information System - Microsoft Internet Explorer

MAXIMUS
HELPING GOVERNMENT SERVE THE PEOPLE™

SchoolMAX™

Education Services | SchoolMAX Home Page

SchoolMAX™

Student Information

- Census
- Student
- Scheduling
- Daily Attendance
- Period Attendance
- Grade Reporting
- Grad Standards/Testing
- Special Education
- Textbook Management
- Discipline
- Health
- Report Ordering**
- Fee Administration
- Teacher Access
- InfoView
- State Reporting
- System Administration
- Log Off

Submit

12:00:58:12 INPUT REQUEST 0.00 Internet

Report Ordering Menu

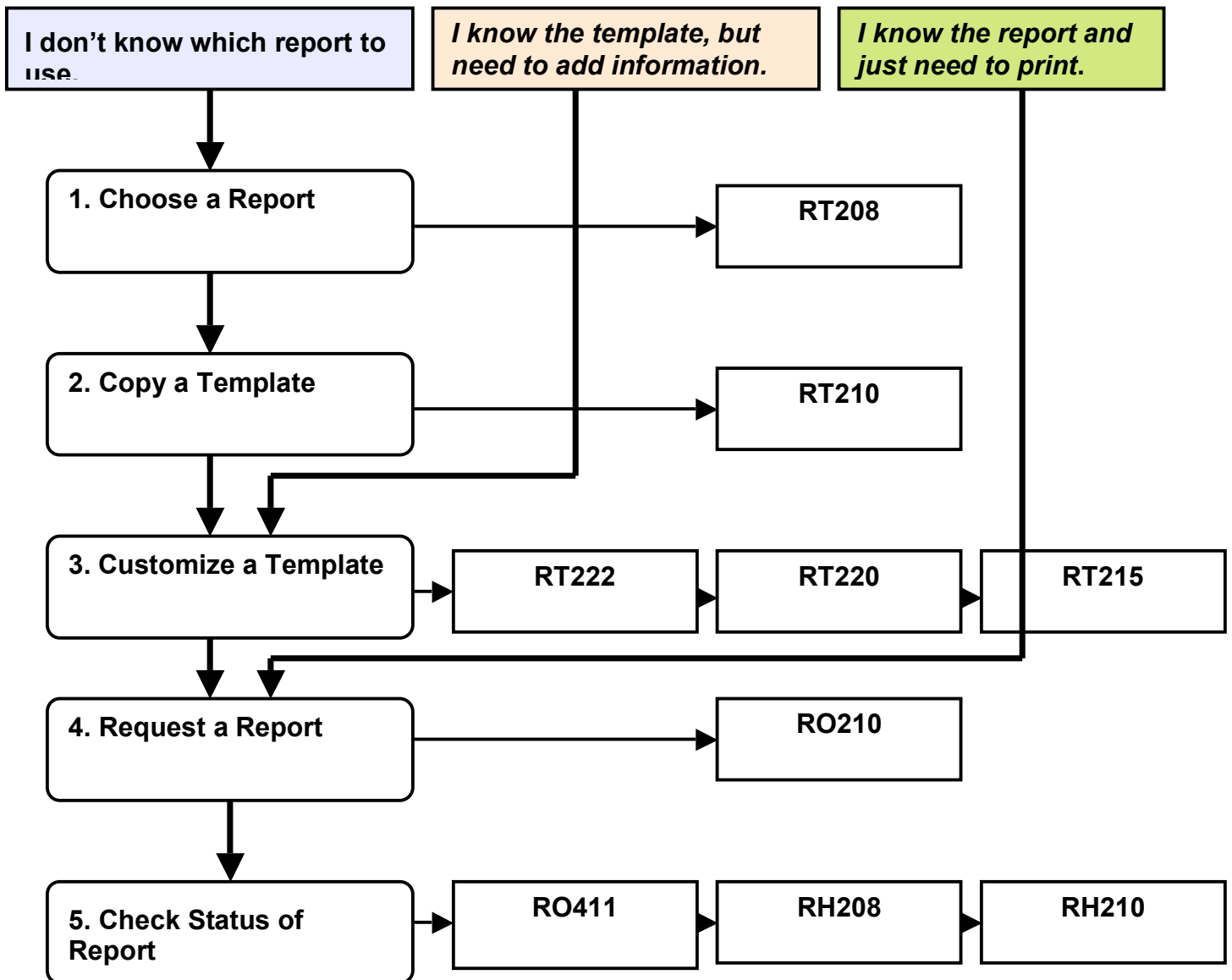
The screenshot shows a web browser window titled "SchoolMAX - Student Information System - Microsoft Internet Explorer". The page header includes the MAXIMUS logo with the tagline "HELPING GOVERNMENT SERVE THE PEOPLE" and the SchoolMAX logo. Below the header is a navigation bar with "Education Services" and "SchoolMAX Home Page".

The main content area is titled "Report Ordering Menu" and features a "Next Screen" dropdown menu. The menu is organized into several sections:

- Inquiry**
 - RD217 - Report Forms List
 - RD226 - Report Element List
- Report Ordering**
 - RO210 - Report Request
 - RO411 - Report Status
- Report Template**
 - RT208 - Report Template List
 - RT210 - Report Template
 - RT222 - Report Template Parameters
 - RT220 - Report Template Include/Exclude
 - RT215 - Report Template Sorts
 - RT225 - Report Template Email Options
- Report History**
 - RH208 - Report History List
 - RH210 - Report History Template
 - RH220 - Report History Include/Exclude
 - RH222 - Report History Parameters
- System**
 - SY000 - SchoolMAX Main Menu
 - END - Log Off

A "Submit" button is located at the bottom right of the menu area. The browser's status bar at the bottom shows the time "11:53:41:00", the text "INPUT REQUEST", and the value "0.00".

REPORT ORDERING WORKFLOW



CHOOSE A REPORT

A complete list of global templates can be found on RT208, Report Template List. Access this screen by choosing the tab from the Report Ordering menu, or by entering the screen name in the Next Screen field from any SchoolMAX screen.

1. To view all global templates, make sure the Global Template box is checked.
2. To view only those templates specific to individual modules, use the pull-down Module box, select the module and hit <enter>. The reports available in that module will appear.
3. To view those templates saved for a school, enter the school number in the white data box adjacent to the Next label at the bottom of the screen. Make sure that the Global Templates Only box is *unchecked*.
4. Saved templates can be sorted based on the school number or creator's initials. Check the appropriate box in the Sort by box.
5. If the report name is known, it may be entered in the second white data field to the left of the Next box at the bottom of the screen.
6. A brief description of the report can be found in the Report Title field.

RT208 Report Template List

The screenshot shows the 'Report Template List' screen in a Microsoft Internet Explorer browser window. The page title is 'SchoolMAX - Student Information System - Microsoft Internet Explorer'. The browser address bar shows 'SchoolMAX Home Page'. The page has a navigation menu with tabs: Menu, Prev Screen, Template, Sorts, Incl/Excl, Parameters, and Rpt Request. The 'Template' tab is selected.

The main content area is titled '<RT208> Report Template List'. It features a 'Next Screen' dropdown menu, a 'Global Templates Only' checkbox (checked), and a 'Sort by' section with radio buttons for 'School' and 'Initials'. Below these are search fields for 'DIST' (2003), 'Module' (a pull-down menu), and 'Next' (with a text input field containing 'ATDAYABS').

A table of report templates is displayed with columns: Seq, Report Title, Form, and Fiche. The table lists various reports such as 'Alabama Student Attendance Ext', 'Alabama Student Attendance Report', 'Daily Attendance Report', 'D/WPA - Attend. Call List', 'DA - Comprehensive Attendance', 'DA - Consecutive Days Absence', and 'Daily Attendance Data Sheet'.

Instructional callouts are present:

- 1. Check to see all global templates. Uncheck if viewing only by school name. (See # 3.)** (Blue box pointing to the 'Global Templates Only' checkbox)
- 2. Use the pull-down menu to limit reports to a specific module.** (Green box pointing to the 'Module' dropdown menu)
- 3 and 5. Use these data fields to search by school number, initials or report name.** (Pink box pointing to the 'DIST', 'Module', and 'Next' fields)
- 6. The report title gives a basic description of the report.** (Yellow box pointing to the 'Report Title' column in the table)

A 'Submit' button is located at the bottom right of the screen.

When the appropriate template is found, check the box to the left of the template. Click on the Template tab at the top and proceed to the next step.

RT208 Report Template List

The screenshot displays the SchoolMAX Student Information System interface. At the top, there is a navigation menu with tabs: Menu, Prev Screen, **Template**, Sorts, InclExcl, Parameters, and Rpt Request. Below the menu, the page title is "Report Template List". The "DIST" field is set to "2003 SchoolMAX GA Test District". A "Module" dropdown menu is open, showing options like ATTENDANCE, CALENDAR, CENSUS, DISCIPLINE, FEES, GRAD STANDARDS, GRADE REPORTING, HEALTH, REPORT ORDERING, and SCHEDULING. A table lists various report templates with columns for Seq, Report Title, Form, and Fiche. Two callout boxes provide instructions: "Click on Template to move to the next step." and "Check the box to the left of the template to be saved." A "Submit" button is located at the bottom right of the page.

Seq	Report Title	Form	Fiche
	Alabama Student Attendance Ext	SLTI03	NO
	Alabama Student Dropout Extrac	SLTI03	NO
	Daily Attendance Absence List	SPTI04	NO
	DA/WPA - Attend. Call List	SPTI04	NO
	DA - Comprehensive Attendance	DPTI04	NO
	DA - Consecutive Days Absence	DPTI04	NO
	Daily Attendance Data Sheet	SPTI04	NO

COPY A TEMPLATE

If the user knows the report name, he may skip the previous step and navigate directly to RT210.

If a template was selected in the previous step on RT208, the report name will automatically populate on RT210. If RT210 was accessed directly, the user will need to choose the report from the pull-down menu, highlight the report name and make sure that Inq is highlighted in the radio maintenance box at the top of the screen.

Once the template is accessed, it must be saved, using the Save As box at the top of the screen. Enter the school number and the unique sequence number to distinguish this version. The message *Record Added* will appear at the bottom of the screen if the save has been successful. **The record has been added but has not been accessed.**

Access the saved version by now entering the school number in the green data field and the sequence number in the sequence field. Press <enter> and the saved version is now ready for customization.

RT210 Report Template

Use the Save as box to copy the template to a new version.

The Seq number is a user-defined version number.

Pull-down menus allow access to all report titles.

Record added

CUSTOMIZE A TEMPLATE

Customization of the template can begin when the saved template has been accessed following the steps outlined in *Copy a Template*.

RT210 is the entry screen to the customization process and provides a summary of the report.

1. A more descriptive title can be entered in the Title field or can be left blank.
2. Description allows the user to write a brief summary of the report details.
3. Destinations shows where the report will be printed. Choose a printer or email from the pull-down menu. Highlight Chg in the top maintenance box and double click or hit enter to make the change. Two destinations may be defined.
4. Multiple copies can be requested by entering the correct number in the Copies box.
5. The Print Style section outlines the different print features available. View options by using the pull-down menus.
6. Includes/Excludes shows what, if any, I/E have been defined for the report.
7. Sort Sequences show how the report has been designed to sort and if the sorts will appear as Headings and/or with Totals. Page breaks can be defined for each sort.

RT210 Report Template

SchoolMAX - Student Information System - Microsoft Internet Explorer

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Education Services | SchoolMAX Home Page

Menu | Prev Screen | Auto Screens | Parameters | Incl/Excl | Sorts | Rpt Request | Email Opt

<RT210> Report Template | Next Screen | Last Update 04/02/2003

DIST: 2003 | Inq Add | Save as | School: SchoolMAX GA Test District | Schl | Seq | Template Secured

REPORT: STINF4UP | SEQ: | Title: Student Information Labels 4 UP (1)

Description: Student Information Labels 4 UP (2)

Form: Special | 3X10LABEL -OR- Standard | Print Style: Number Sides: One Side (2) | Orientation: Portrait | Punched: Not punched | Paper Style: Plain (5) | Spacing: Single-space

Destinations: TIESLINE (3) | Copies: 1 (4) | Fiche: | Copies: |

Includes/Excludes: NO (6)

Sort Sequence	Hdg	Tot	Brk
1 Enrolled Grade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Full Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sort Sequence (4)

Submit

Record added | Internet

Auto Screens

Auto Screens guide the user through the three areas that can be customized. From RT210, double click on the Auto Screens tab to begin the process. Or, choose the appropriate screen (Parameters, Includes/Excludes, Sorts or Report Request) to navigate to the individual screens.

Parameters

All parameters that can be customized for the report are listed.

1. Define the parameters following the format suggested. For example, in the following parameter screen, options of defining Currently Enrolled or All Students would be entered following the format suggested (C) or (A).
2. From and To Values need only be defined for those parameters that require a range of numbers.
3. If the description does not offer a range value or suggested format, add an X in the From Value field to signify the choice of this parameter.
4. The Next data field at the bottom of the screen will contain a number if more parameters exist. Hit <enter> to see these options.
5. When finished setting parameters, use the Auto Screens button to move to the next screen to customize, or enter the screen number in the Next Screen box.

RT222 Report Template - Parameters

SchoolMAX - Student Information System - Microsoft Internet Explorer

Education Services | SchoolMAX Home Page

Menu | Prev Screen | Auto Screens | Template | Incl/Excl | Sorts | Rpt Request

<RT222> Report Template - Parameters | Next Screen

DIST: 2003 | SCHL: 100 Kit's Elementary | REPORT: STBASIC SEQ: 78 Student Basic Readout Report

Parameter	From Value	To Value
(C)urrently Enrolled or (A)ll Students	C	
Currently Enrolled 'As of' date YYYYMMDD		
Print (D)etail line, (S)ummary or (B)oth	B	
If Summary, Print (C)nt, (P)ct or (B)oth		
Public Directory Exclusions		
Print Transportation Optional Line		
Print Special Education Optional Line		
Print Membership Optional Line		
Print Attendance Optional Line		
Print Home Phone and Mailing Addr Line		
Print HH wall Phones Opt Line	X	
Print Contacts Optional Line		
Main Code for Selecting Contacts		

14 Next Parameter Sq

Submit

19:20:21:62 INPUT REQUEST 0.00

Sorts/Totals/Page Breaks

This screen allows the user to determine how the data will be presented in the report. Those elements that are available for sorts, totals or breaks will appear with a Y in the respective field in the pull-down menu box. A Y will represent if the element can be used as a heading; calculated as a total count; or used as a benchmark for a page break. To set sorts:

1. Choose the element you wish to include in the sorts/totals or page breaks and copy/paste into the description field, or type exactly as the element name appears in the pull-down box.
2. Place an A in the A/C/D field to add an element, C to change an element or D to delete an element.
3. Enter a Sort Sequence to designate the order in which the element will sort. One is highest priority.
4. When finished adding sorts, hit <enter> to save the changes. The report is now ready to print. The Auto Screen feature will now return to RT210—the template entry screen—and update the customization that has been completed. Print the report by choosing Auto Screens again, or Rpt Request from the top tabs.

RT215 Report Template – Sorts/Totals/Page Breaks

SchoolMAX - Student Information System - Microsoft Internet Explorer

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Education Services | SchoolMAX Home Page

Menu | Prev Screen | Auto Screens | Template | Parameters | Incl/Excl | Rpt Elements | Rpt Request

<RT215> Report Template - Sorts/Totals/Page Breaks

DIST 751 School 0101 WCHS REPORT SCCRSLSST SEQ 82 Course List with Unscheduled Students

Element List: Element Name Hdg Tot PgB JB SECURED

A/C/D	Sort Seq	Element	Heading	Total	Page Break
	1	Course Requested			
	2	Full Name			

Submit

14:13:36:08 INPUT REQUEST 0.00 Internet

REQUEST A REPORT

After templates have been customized, they may be printed. Once templates are built/customized, the previous steps can be omitted and the user can move directly to this step.

RO210 Report Request

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The screenshot shows the 'SchoolMAX - Student Information System - Microsoft Internet Explorer' window. The page title is 'SchoolMAX Home Page'. The main content area is titled '<RO210> Report Request'. It features a navigation bar with buttons for 'Menu', 'Prev Screen', 'Template', 'Sorts', 'Incl/Excl', 'Parameters', 'Email Opt', and 'Status'. Below this, there are input fields for 'DIST' (2003 SchoolMAX GA Test District) and 'Module'. A table lists report entries with columns for A/C/D, Schl, Report, Seq, Sch Yr, Title, Overnight, and Page Limit. Two entries are visible: one for 'Cherokee Elem Master Schedule' and another for 'Cherokee Elem.'. Each entry has associated fields for 'Destination 1', 'Email 1', 'Destination 2', and 'Email 2'. A 'Submit' button is located at the bottom right of the form area. The status bar at the bottom shows the time '12:01:18:66', the text 'INPUT REQUEST', and the value '0.00'.

1. Enter A to add the requested template.
2. Enter the school number in the Schl field.
3. Using the pull-down menus (or using copy and paste from the previous screen), enter the report to be printed in the Report field.
4. Enter the sequence number in the Seq field.
5. Enter the school year for which you wish to print the report in the Sch Yr field.
6. If a different title is needed, add the new title name in the Title field.
7. If the report is scheduled to print overnight, check the Overnight box.
8. The number of pages to print can be limited by entering a number in the Page Limit field.
Note: Page one of the report is always a cover sheet that lists the data found on RT210.

Tip: Set the Page Limit to 5 or less for the first run of the report until it is determined the customization is

9. Enter the destination(s) for the report in the Destination 1 and Destination 2 boxes.
10. Enter the number of copies requested in the Copies box.
11. If Email was chosen as a destination in step 9, choose the email format from the pull-down box. (Only TXT attachments are available at this time.) Please see *Request an Email Report* for other options .
12. Enter the email address in the data field to the right of the email field. Note: If the user has an email address entered in OS110, “me” can be added to this field and SchoolMAX will send the report to that address in OS110.
13. Press <enter> to initiate the report request. A message will appear showing the status of the report. Continue to refresh the screen by hitting <enter> to monitor the progress of the request.

Note: The report request will disappear from this screen when the report has been successfully entered into the report queue. If the report is not successful, the report will remain on this screen and should be deleted. Please refer to the *Check Status of Report* section for more information.

CHECK STATUS OF REPORT

Three screens provide a status of the report request. Some reports print immediately, while some may take up to an hour to generate and eventually print. The length of time necessary to print the report will help determine which screen is appropriate to view the status. Those that print immediately may only appear on this screen for a short time. If the report request is not found here, it has probably processed. Please skip to the next section for more information.

RO411 Report Status

The screenshot displays the 'Report Status' screen in the SchoolMAX system. The interface includes a navigation bar with 'Menu', 'Prev Screen', 'Rpt Request', 'Template', 'Sorts', 'Incl/Excl', and 'Parameters'. The main area shows a 'Report Status' form with filters for 'DIST' (2003 SchoolMAX GA Test District), 'Module', 'Select Status' (Scheduled, Active, Requested, Abnormal End), and 'Sort by' (Schl, Report Name, Schl, Report Date). A table lists reports with columns for 'Schl', 'Report', 'Seq', 'Title', 'Overnight', and 'Status'. A red circle highlights the 'Select Status' and 'Sort by' options. A callout box points to the table with the text: 'Report Status can be viewed and sorted by the choices available in these boxes.' A 'Submit' button is at the bottom right.

Schl	Report	Seq	Title	Overnight	Status
<input type="checkbox"/>	3030 SCMSMRT	1	Cherokee Elem Master Schedule	<input type="checkbox"/>	NO RECORD EXTR
	Date	04/17/2003	14:18:48 Operator TW	Destination	EMAIL
<input type="checkbox"/>	3030 STBASIC	101	Cherokee Elem.	<input type="checkbox"/>	NO RECORD EXTR
	Date	04/28/2003	16:55:54 Operator TW	Destination	TIESPAGE
<input type="checkbox"/>			Date	Operator	Destination
<input type="checkbox"/>			Date	Operator	Destination
<input type="checkbox"/>			Date	Operator	Destination
<input type="checkbox"/>			Date	Operator	Destination
<input type="checkbox"/>			Date	Operator	Destination
<input type="checkbox"/>			Date	Operator	Destination
<input type="checkbox"/>			Date	Operator	Destination

RO411 Report Status shows those reports currently being processed, as well as the reports that have not processed. Status Reports can be filtered and sorted based on the variables checked in the boxes on this page.

- View all pending reports by leaving the module field blank, checking ALL operators and checking all fields in Select Status.
- Report status can be viewed for reports specific to a particular module by choosing that module from the pull-down menu.
- Report status can be limited based on the status by checking the appropriate box in Select Status:
- The reports can be sorted by checking the appropriate box on Sort By.

- Data in the Next field at the bottom of the screen indicates another page of report requests exist. Navigate to that field by hitting enter.
- More information about the report can be accessed by highlighting the check box to the left of the report name and then choosing an option from the tabs at the top of the screen.
- Status messages include:
 - Page Overflow: This indicates that a page limit was set for the report and that it printed the specified number of pages, but that more information available that was not printed. This is a “good” error since the user set the restriction.
 - Requested: The report request has been processed and has been queued for processing.
 - Active: The report is currently being processed by the server.
 - No Record Ext: There was an error in the customization that did not allow any data to be extracted to the report.

Note: RO411 is a view-only screen and will not allow requests or templates to be modified.

RH208—Report History List

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Education Services | SchoolMAX Home Page

Menu | Prev Screen | RHist Template | RHist Inc/Exc | RHist Param

<RH208> Report History List | Next Screen

DIST: 2003 SchoolMAX GA Test District

Module: [Dropdown]

Sort by: Request Date SchL, Rpt Name

<input type="checkbox"/>	Schl	Report	Seq	Request Date/Time	Report Title	Init	Status
<input type="checkbox"/>	100	STBASIC	78	05/01/2003 08:17:27	Kit's Test of e	KA	Completed
<input type="checkbox"/>	100	ATOCCUR	79	04/28/2003 19:31:59	Daily Absence/T	KA	Completed
<input type="checkbox"/>	100	ATOCCUR	79	04/28/2003 19:31:59	Daily Absence/T	KA	Completed
<input type="checkbox"/>	3030	STBASIC	101	04/28/2003 16:55:54	Cherokee Elem M	TW	No Recs Extr
<input type="checkbox"/>	100	EVCMPDISC	78	04/18/2003 11:30:07	Comprehensive D	KA	Completed
<input type="checkbox"/>	100	ATABSLST	78	04/18/2003 11:22:22	Attendance	KA	No Recs Extr
<input type="checkbox"/>	3030	SCMSMRPT	1	04/17/2003 14:18:48	Cherokee Elem M	TW	No Recs Extr
<input type="checkbox"/>	3030	SCMSMRPT	1	04/17/2003 14:17:08	Cherokee Elem M	TW	No Recs Extr
<input type="checkbox"/>	3030	SCMSMRPT	1	04/17/2003 14:16:15	Cherokee Elem M	TW	No Recs Extr
<input type="checkbox"/>	3030	SCMSMRPT	1	04/17/2003 14:14:07	Cherokee Elem M	TW	No Recs Extr
<input type="checkbox"/>	3030	SCCLSLST	1	04/17/2003 12:37:27	Cherokee Elem	TW	No Recs Extr
<input type="checkbox"/>	3030	SCCLSLST	1	04/17/2003 12:36:19	Cherokee Elem	TW	No Recs Extr
<input type="checkbox"/>	3010	CEDWLLIST	1	04/17/2003 06:14:40	Dwelling List f	TW	No Recs Extr
<input type="checkbox"/>	3010	CEDWLLIST	1	04/17/2003 06:12:17	Dwelling List f	TW	No Recs Extr
<input type="checkbox"/>	100	EVCMPDISC	78	03/18/2003 16:10:27	Comprehensive D	SF	Completed

Next: [100] [EVCMPDISC] [78] [03/17/2003] [155550]

Submit

13:06:48:47 INPUT REQUEST 0.00 Unknown Zone

RH208 Report History List provides a history of the report request. Requests can be sorted by report type. Choose the report from the pull-down menu and hit <enter> to see only those reports.

Report histories can be sorted by request date or school and report name. Choose the appropriate button at the top right of the screen.

A number in the Next field at the bottom of the screen indicates more report histories are available. Navigate to this screen by hitting <enter>.

To view more detailed information about the report, check the box to the left of the report name and then choose the appropriate tab from the top of the screen.

RH210 –Report History Template

Report History Template

DIST: 2003 | School: 100 | REPORT: STBASIC | SEQ: 78 | REQ DATE: 5012003 | REQ TIME: 81727
 Title: Kit's Test of email | Student Basic Readout and Summaries
 Last Update: 06/01/2003 | KA | Sch Year: 2003

Save As:

Destinations: EMAIL (Copies: 01), Fiche (Copies: 0)
 Includes/Excludes: NO

Sort Sequence	Hdg	Tot	Brk
1 School	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 Enrolled Grade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Full Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit

RH 210 Report History Template provides a snapshot of RT210. Included on this screen is the status, printing destinations, report layout parameters and other basic information defined on the template. Also note that other users may choose to save this template to a different version from this screen.

SCREENS ASSOCIATED WITH REPORT ORDERING

RD217 Report Forms List: Provides a list of the compatible forms for the report output.

RD226 Report Element List: A comprehensive list of the data elements, valid values and From To Values available for each element, based on report.

RT208 Report Template List: Complete list of all templates available. Can be sorted by global, school, creator's initials or module.

RT210 Report Template: The entry screen for customization of the template. Gives an overview of available customization options and allows users to save to another sequence number. Shows the form defined and/or the print styles.

RT222 Report Template Parameters: Screen used to define the parameters for a custom report.

T220 Report Template Include/Exclude: Screen used to defined include/excludes for a custom report.

RT215 Report Template Sorts: Screen used to define sorts, headings and totals for a custom report.

RT225 Report Template Email Options:

RO210 Report Request: Screen used to request a report be printed/emailed.

RO411 Report Status: Screen used to check the status of reports still in the print queue.

RH220 Report History List: Screen used to review the history of all reports requested, as well as the outcome of the request.

RH220 Report History Include/Exclude: Screen that details the Includes/Excludes set for a report requested.

RH22 Report History Parameters: Screen that details the Parameters set for a report requested.