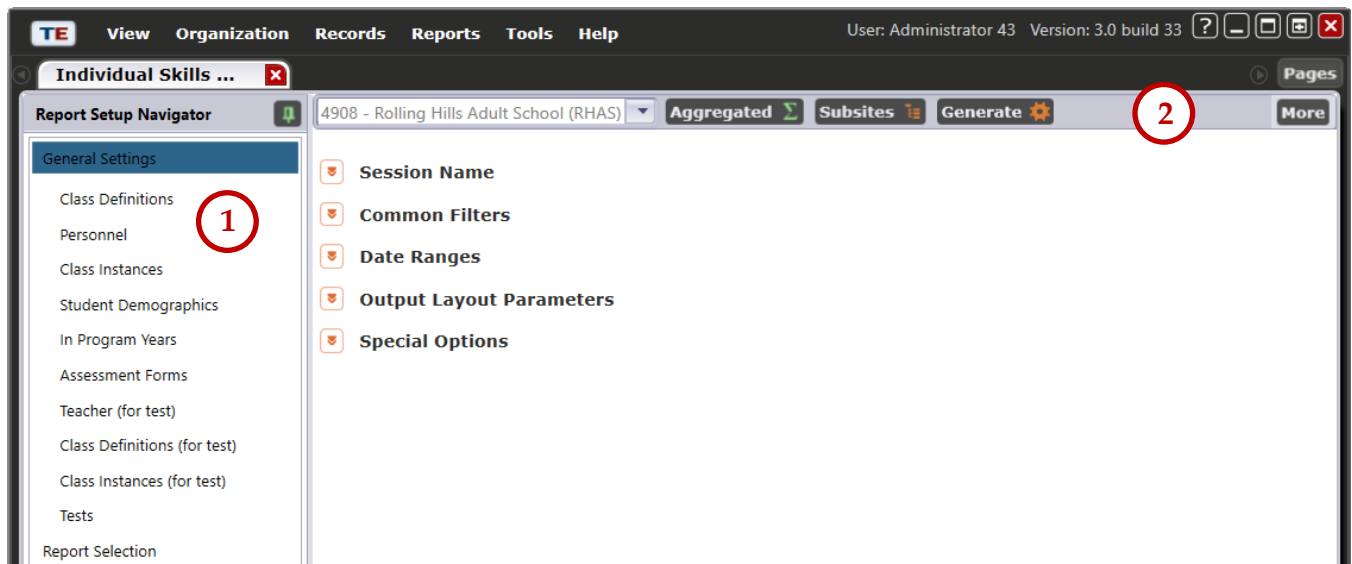


TE Report Generator Overview

Whenever you select any report from the **Reports** menu, you are presented with the **Report Setup** screen, also referred to as the **Report Generator**. This mostly generic reporting interface allows you to set up complex filtering and sorting options for each report.

Each setup screen consists of two main sections.

1. Report Setup Navigator
2. Report Setup Toolbar



Report Setup Navigator

Let the **Navigator** be your Guide! Use the **Navigator** to:

- Define specific settings using the **General Settings** page
- Filter the initial population using available **Filters**
- Choose which reports to display using the **Report Selection**

General Settings

The **General Settings** page contains five distinctive sections for all reports, as follows:

Session Name

TOPSpro Enterprise assigns the **Name** to the reporting **Session** based on the report generated. This includes the date and time the report was generated and the logged-on user.

The screenshot shows the 'General Settings' section of the 'Student Competency...' report. The 'Session Name' field is highlighted with a red box, displaying the text: 'Student Competency Performance on June 17, 2018 at 19:09:56 by administrator43@rhas.org'.

Common Filters

As the section title implies, **Filters** in this section are **Common** for many reports.

The screenshot shows the 'Common Filters' section of the 'Student Competency...' report. The 'Common Filters' section is highlighted with a red box, showing options for 'Program Years' and 'Class Status'.

Date Ranges

The combination of **Data Ranges** varies depending on the type of report you are generating.

The screenshot shows the 'Date Ranges' section of the 'Individual Skills ...' report. The 'Date Ranges' section is highlighted with a red box, showing fields for 'Activity date' and 'Assessment date'.

Output Layout Parameters

Settings in this section are specific to the type of report you are generating.

Special Options

Most reports include **Special Options** to filter the report further. These options can be very helpful to target a specific segment of the learner population. Settings in this section vary depending on the type of report you are generating.

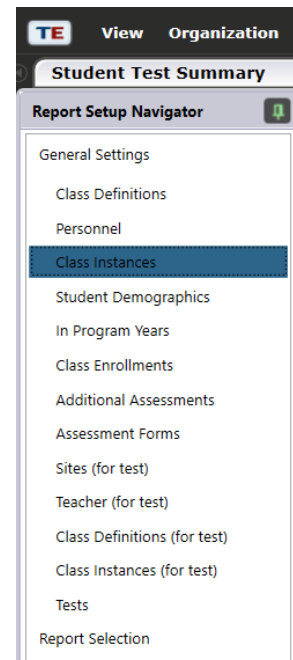
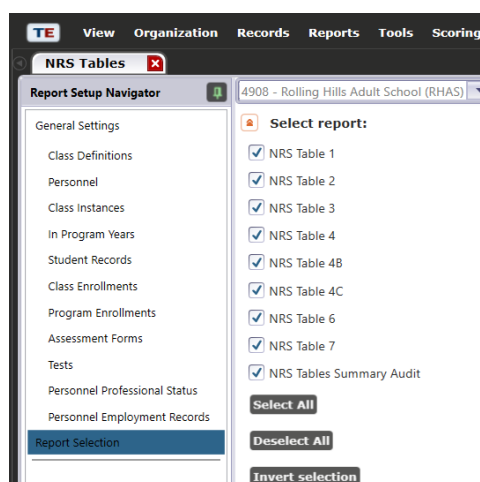
Listers Selection

The **Navigator** gives access to lists of records as each **Lister** name indicates to include in the report.

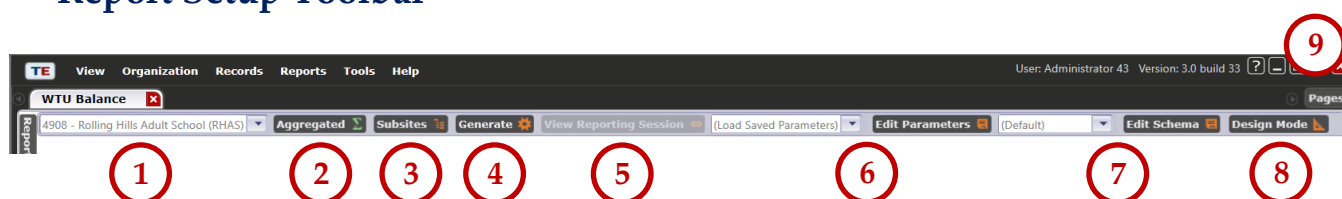
After applying any settings for your report in **General Settings**, then select a **Lister** to filter for classes, students, assessments, etc. before generating the report.

Report Selection

The **Report Selection** lists the available sub-reports or related outputs that apply to the primary report you are generating. With certain reports, you can use this list to have the results saved to a spreadsheet.



Report Setup Toolbar

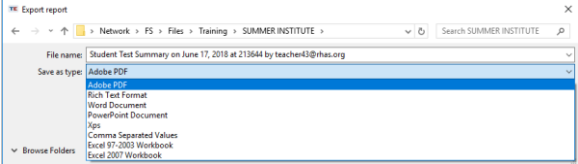
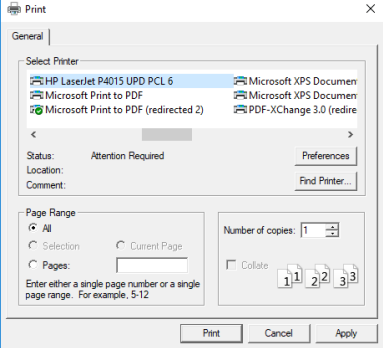
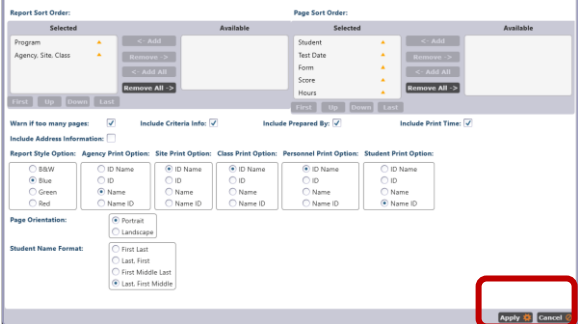


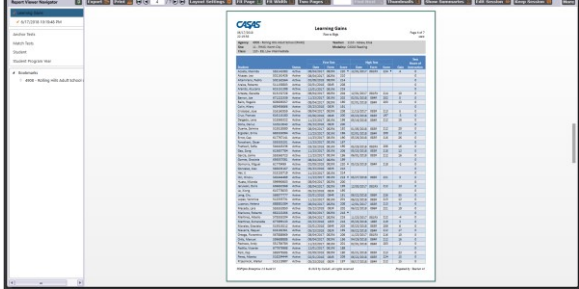
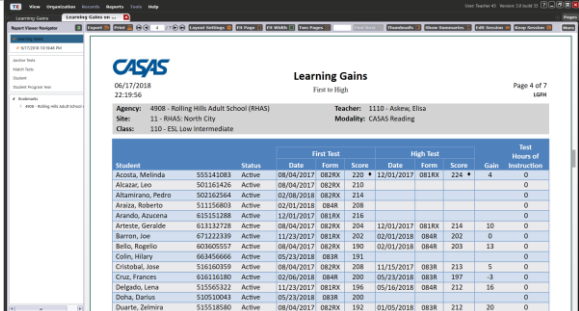
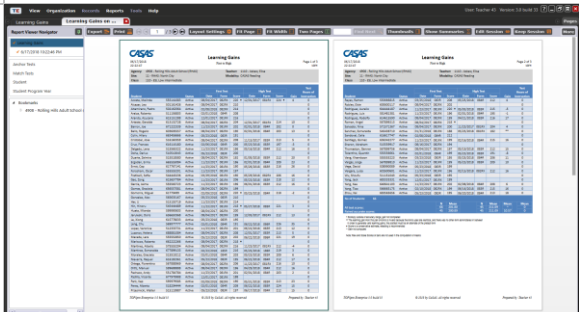
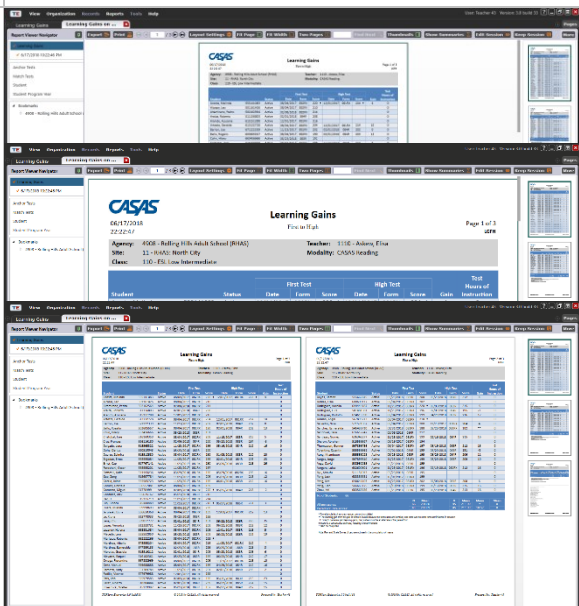
1. Specify the base **Container**: an agency, a site, or a state (all agencies from that state)
2. Specify if the report will **Aggregate** data or not (combine all learner records into one)
3. Specify if the report will include **Subsites** or not
4. **Generate** a reporting session to display the report in the **Report Viewer**
5. Return to the report page from any screen with **View Reporting Session**
6. **Edit Parameter** settings for filtered reports and **Load Saved Parameters**
7. **Edit** general settings and save the **Schema** to retrieve and generate again
8. **Design** the general settings page
9. Use **Pages** to clear all pages open on your screen at the same time or close specific pages

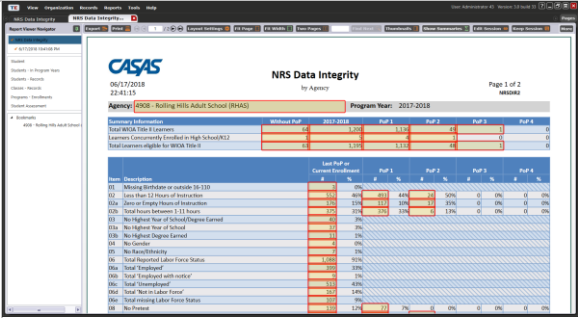
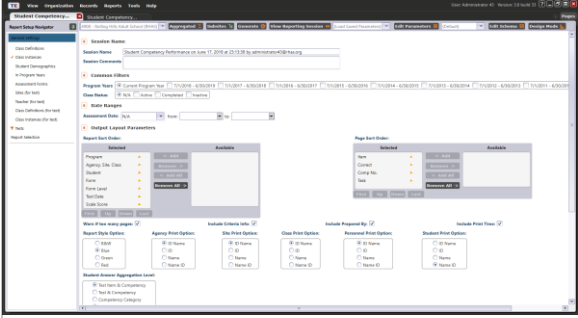
Report Viewer

The **Report Generator** displays reports in a **Report Viewer**. In 'TE' terms, a generated report is a '**Reporting Session**.' When the report generates, a new tabbed page opens displaying the report with a **Toolbar** along top of the report with several options for viewing and the report displayed.

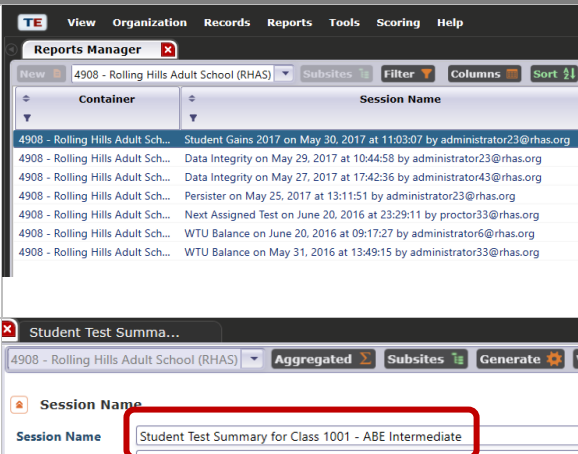
Reporting Session Toolbar

| Step | Screen | Description |
|------|---|--|
| 1. |  | 1. Export the displayed report to a file on the local machine. The default file type is PDF. Use the File Explorer window to change the file type. Export to save as a PDF file, or other file type, on the local machine. |
| 2. |  | 2. Print the report on a local printer. |
| 3. |  | 3. Layout Settings displays the Output Layout Parameters section in the Report Viewer . Change Layout Settings , and then use Apply to generate the report again. |

| Step | Screen | Description |
|------|---|--|
| 4. |  | <p>4. Fit Page displays the whole page on the screen.</p> <p>Use to zoom the document so you can see the entire page in the report viewer.</p> |
| 5. |  | <p>5. Fit Width displays the report so that the page matches the width of the window.</p> <p>This is the default display after generating a report.</p> <p>Use Fit Width to return to the default display after using other display options.</p> |
| 6. |  | <p>6. Two Pages will zoom the report so you can see two pages displayed side-by-side in one window.</p> <p>This also enables two-page scrolling.</p> |
| 7. |  | <p>7. Thumbnails applies a bar to the right of the report viewer with miniature displays of each page in the report.</p> <p>Thumbnails enable you to toggle through many pages on the screen at once.</p> <p>Add Thumbnails when displaying reports as Fit Page, Fit Width, and Two Pages views.</p> |

| Step | Screen | Description |
|------|---|---|
| 8. |  | 8. Show Summaries identifies all cells displayed on a report with Drill Down to data functionality. |
| 9. |  | 9. Edit Session returns you to the General Settings screen for you to edit any settings and then generate the report again. |

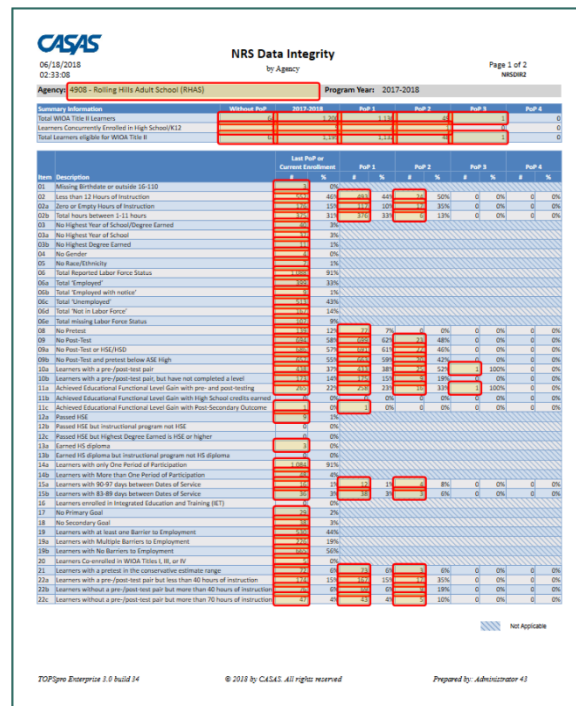
Saving Reports

| Step | Screen | Description |
|------|---|--|
| 10. |  | <p>10. Keep Session saves an electronic copy of the report in the TE Reports Manager.*</p> <p>When clicked, the Report Viewer closes immediately (without warning!) and returns to the Report Setup Screen automatically.</p> <p>*Tip! Before saving reports in TE, use General Settings to Name the report to help locate in the Reports Manager.</p> |

11. **Refresh** will update the report if any data changed or new data was added while displaying the report in the **Report Viewer**.

Using Drill Down

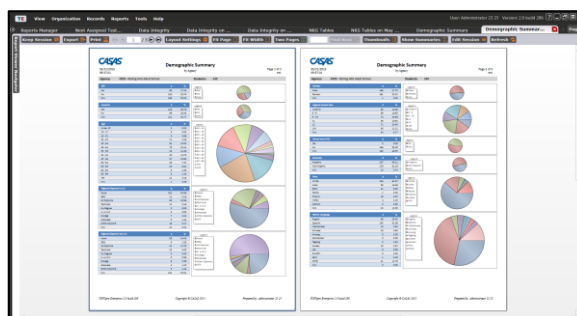
The **Drill Down** function in TE allows you to get at data displayed in reports. To drill down through a series of lists means to go through the hierarchy of data to find a specific record. This is a very beneficial feature to make corrections to data or add missing data on an ad hoc basis. The Report Viewer enables you to move from the summary information displayed on a report to detailed data by focusing on a specific data element. For example, if a birth date is missing, using drill down will take you to the student Demographics record to add the date of birth and then generate the report again to confirm the change.



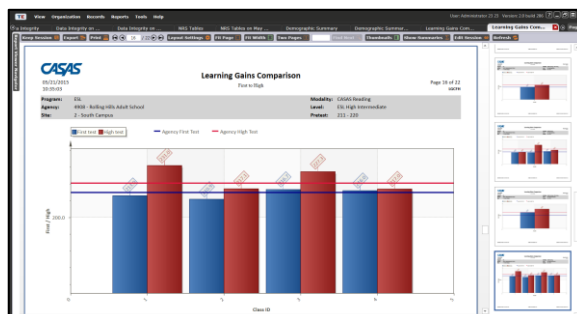
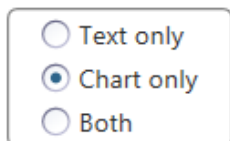
Displaying Data as Charts and Graphs

Reports for quantitative information and comparative data include the option to generate a report with text only, as a pie chart, a bar chart, or both. Use **Output Layout Parameters** from **General Settings** to select the type of chart or graph before generating the report.

Chart Type:

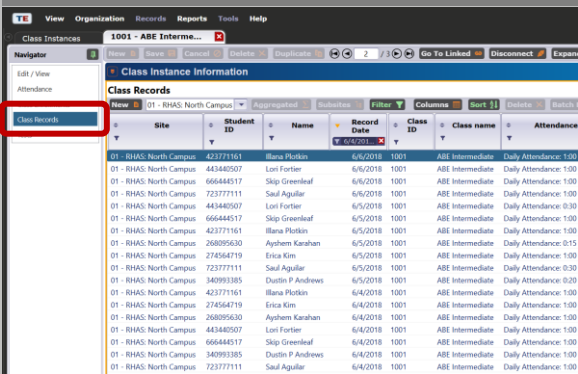
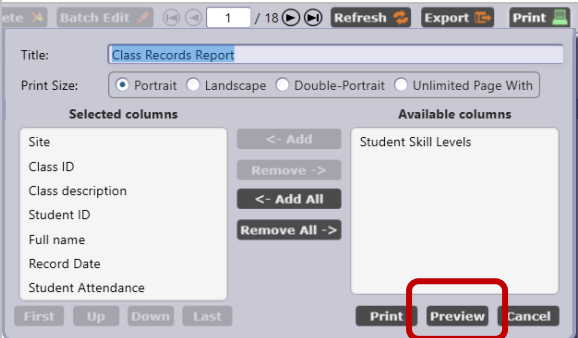
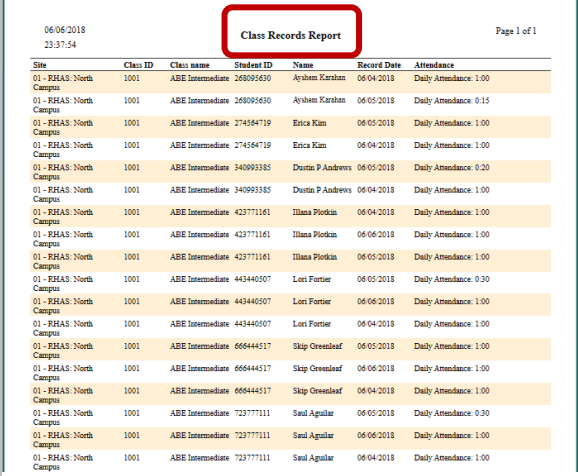


Comparison type:



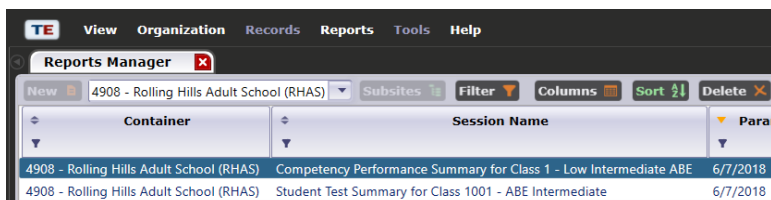
Printing Reports from Listers

The **Print** function in **Listers** enables you to create ad hoc reports of the records listed. These ad hoc reports cannot be saved in the TE Reports Manager.

| Step | Screen | Description |
|------|---|--|
| 1. |  | <ul style="list-style-type: none"> Use Lister columns to Filter and Sort the records you want to include in an ad hoc report. |
| 2. |  | <ul style="list-style-type: none"> To print the filtered/sorted list, <ul style="list-style-type: none"> Click Print from the Toolbar at top of the list of records. If needed, <ul style="list-style-type: none"> Set Print Size. Select and order Columns. Before printing, <ul style="list-style-type: none"> Click Preview. |
| 3. |  | <ul style="list-style-type: none"> A tabbed page will open to display the report. From Preview, the report may be, <ul style="list-style-type: none"> Printed, or Exported <ul style="list-style-type: none"> Saves the report as a PDF file type by default on the local machine, or You may choose a different file type before saving the ad hoc report. |

Reports Manager

The **Reports Manager** is a virtual filing cabinet that you have access to at any time, and from any location with Internet access to retrieve your saved reports.



My Reports

The **My Reports** menu becomes available after you select your reports using the **Report Locator Wizard**.

Report Locator Wizard

Use the **Report Locator Wizard** to set up shortcuts to your favorite reports for quick access to the reports you generate the most.

