Quick Report and Quick Prints

Generate a Quick Print Using the Quick Print Icon

Use a Quick Report to create an on-the-fly report of the information you are viewing on a list page. You decide what's on it, and the system formats it to look professional.
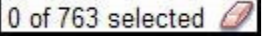
A Quick Print is a simple Quick Report you can generate by clicking the **Quick Print** icon 🖶 in the menu bar on any list page. Select an output format, and you're done.

Clicking this icon once is the same as going to the **Options** menu, clicking **Quick Report,** and selecting the *Simple* report type.

Or, to create a different type of Quick Report, click the **Quick Print** icon and then select **Create Quick Report** to go directly to the Quick Report wizard.

To generate a Quick Print using the Quick Print icon:

1. Go to the list page containing the type of data you want to report on.

2. Select the records you want to include on the report.

    IMPORTANT: Quick Reports include any records that appear on the current list `0 of 763 selected ✎` *(in this example, 763). Use a filter, query, snapshot, or custom selection to limit the number of records to include in the Quick Report. If you select records by hand, go to **Options > Show Selected.***

3. Click the **Quick Print** icon in the menu bar. The menu expands:

4. Click one of the following format options:

    • **Web Page (HTML):** to view the information in an HTML file.

    • **CSV:** to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension

    • **TXT:** to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension.
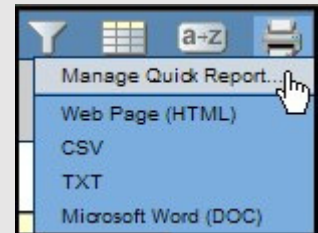
    Note: The two comma-separated values formats create identical files; the only difference is the file extension. Some web browsers only handle one extension properly. Use the extension that works for your browser.

    • **Microsoft Word (DOC):** to view the information in a Word document. The data appears in a table, which has all the available options for borders and shading.

5. To print the report, do one of the following:

    • From your browser window or dialog box, go to **File > Print.**

    • From Microsoft Word, click the **Office** button 🔘 and then **Print.**

To generate a detail, summary, or group Quick Report using the Quick Print icon:

1. Go to the list page containing the type of data you want to report on.

2. Select the records you want to include and go to **Options > Show Selected,** if necessary.

3. Click the **Quick Print** icon 🖶 in the menu bar. The menu expands.

4. Click **Create Quick Report** to open the Quick Report wizard. See pages 2-4 for complete instructions.

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Generate a Quick Report from the Reports Menu

Use the **Reports** menu to generate any type of Quick Report — but if you're creating a *Simple* Quick Report, it's easiest to use the **Quick Print** icon on the menu bar (see Page 1).

IMPORTANT: Quick Reports include any records that appear on the current list `0 of 763 selected` *(in this example, 763). Use a filter, query, snapshot, or custom selection to limit the number of records to include in the Quick Report before you start creating it.*

To create a *Detail, Group,* or *Summary* Quick Report on any list page:

On the **Reports** menu, click **Quick Report.** The 8-step Quick Report wizard appears (the last four steps are optional — for formatting purposes).

Step 1: Source

1. Select **New report** to create a new report.
2. Click **Next.**

Step 2: Report Type

1. Click the **Report type** drop-down to select one of the following:
   - **Simple:** produces a list of the selected records and fields. You pick the columns and sort order.
   - **Detail:** produces a page for each record, and the report aligns the data fields vertically instead of horizontally. For example, an entire page prints for each student you include.
   - **Group:** groups records by the fields you select. For example, on a Student List you can group records by homeroom. Use *Group* Quick Reports to print homeroom or bus lists.
   - **Summary:** hides individual records from the list and produces a list of cumulative values based on the records. Use this report to print totals and other statistical reports.
2. Click **Next.**

Step 3: Field Selection

1. Select the fields you want to include on the report and the order you want them to appear in:

   - Highlight a field in the ***Available Fields*** column, then click **Add** to add it to the ***Selected Fields*** column. To select several fields next to each other, click the top field, press and hold the **SHIFT** key, and press the **Down** arrow on your keyboard. To select several fields that do not appear next to each other, press and hold the **CTRL** key while you click each field you want to include.
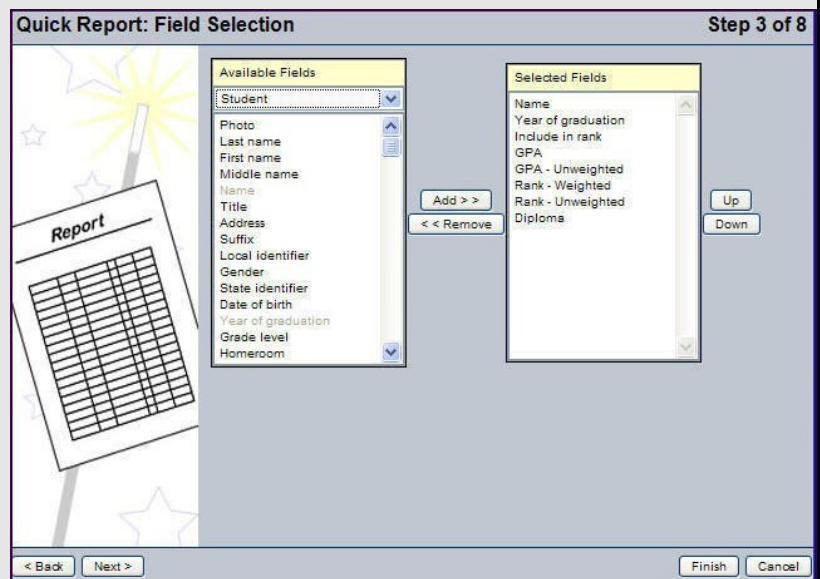
     *Note: To remove a field from the **Selected Fields** column, highlight it, and click **Remove.***

   - Sort the fields in the ***Selected Fields*** column to appear in the order you want them on the report.
     The first field in the ***Selected Fields*** column is the first field to appear for each record on the report. Highlight a field, and click **Up** or **Down** to move it.

2. Click **Next.**

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Step 4: Sort Order

1. To determine how the system sorts the overall report, such as which records print first, do the following:
   - In the **Available Fields** column, highlight the field you want the system to use to sort the report by, and click **Add** to move the field to the **Selected Fields** column. You can continue to select fields and add them below the primary sort.
   - In the **Selected Fields** column, highlight the fields and click **Up** and **Down** to determine the sort order (the field that appears first in the column is the primary sort, then the secondary sort, and so on).
   - To have a field sort in descending order (such as names Z-A instead of A-Z), highlight the field name in the **Selected Fields** column and click **Change Sort** *–(desc)* appears next to the field.

2. Click **Next.**

Step 5: Totals and Statistics

1. To include totals of records on the report, select the **Total Count** checkbox next to the group.

Note: *If you selected the Group report type in Step 2 of the wizard, the report can also include totals by any of the groups you defined in that step. Then, select the **Page Break** checkbox if you want the report to start on a new page after each group and its totals appear.*

2. In the **Statistics** section, for each field you include on the report, the report can provide the minimum, maximum, and total count of each field. You can also track field averages and sums for numeric fields. Following any statistic selection, if you have selected "group by" fields, specify exactly when you want that statistic to reset. By default, the statistic will be reset only at the end of the report. If a group field is chosen, the value will be reset at the end of that grouping, allowing you to view group-based statistics.

   You can add several statistics and resets for each field.

3. Click **Next.**

Step 6: Format Options

1. Use the following table to enter information in the fields:

Field	Description
Report title	Type a title for the report.
Print date	Select this checkbox if you want the report to print the current date.
Format	Select one of the following: • **Web Page (HTML)** to view the information in an HTML file. • **Comma-separated values (CSV)** to view the information in a text file that separates each field with a comma. If saved, the file will have a .CSV extension. • **Comma-separated values (TXT)** to view the information in a text file that separates each field with a comma. If saved, the file will have a .TXT extension. *Note: The two comma-separated values formats create identical files; the only difference is the file extension. Some web browsers only handle one extension properly.*

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Field	Description
Font face	Select the font you want the report to print in.
Font size	Select the font size of the report.
Grid lines	Select the type of grid lines (vertical, horizontal, or both), if any.
Shade alternate lines	Select this checkbox if you want the report to shade every other line for easier viewing.
Note: Some options are only available for specific formats.	

2. Click **Next.**

Step 7: Field Format Options

1. For each field (column of information) that appears on the report, you can define a custom width in number of characters, and specific font and text effects.

*Note: If you include a field that contains a large amount of text, you can define the number of characters to display. Then, you can select a value at the **Overflow handling** field. For example, if you select **Wrap,** any text after the custom width appears on the next line of the report.*

2. Click **Next.**

Step 8: Save Options

1. Use the following table to enter information in the fields:

Field	Description
Save Options	Select one of the following in the **Save Options** box: • **Don't save** if you do not want to save the report parameters you just selected. To recreate this report, you'd have to go through the wizard again. • **Save** if you have made changes to a previously saved report. • **Save as** to save the report.
Name	If you selected **Save as,** type a name for the report (file name, not report title).
Owner Type	Select the type of report **(User, School,** or **District). The options available to you depend on your privileges.
Owner Name	Click 🔍 to change the name of the report's owner.

2. Click **Finish.** The report displays the information in the format you selected.