LACES LiteracyPro Reporting
User Manual

LiteracyPro Systems

TOOLS for SOCIAL CHANGE

Revised 2/8/2008

LITERACYPRO REPORTING USER MANUAL

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INTRODUCTION

WHAT IS LITERACYPRO REPORTING?

LiteracyPro Reporting is a web-based reporting utility add-in to LACES that is designed to make building, sharing, and analyzing reports a quick and easy process, even for non-technical users. With **LiteracyPro Reporting** there is no need for downloadable report viewers and little time or assistance is required from technical developers to create professional, informative reports. **LiteracyPro Reporting** delivers a user-friendly interface and full-featured reporting tools. With an easy-to-use Report Builder, users can create interactive charts and graphs, as well as publish comprehensive reports to share with others. With **LiteracyPro Reporting**, it is not necessary to understand SQL or databases in order to create robust, customized reports in minutes.

Here are just a few of the many features that come with **LiteracyPro Reporting**:

- Select views and columns for reports
- Build database queries
- Select graphical report templates
- Add parameters to filter report data
- Include interactive paging, search functionality and printing options
- Edit existing reports
- Export to Excel, PDF, Word, XML or CSV formats
- Interactively sort columns of data in a report
- Use drill-down reports to organize columns and data

This guide provides information and instruction for users building reports with **LiteracyPro Reporting.** The following information is included in this manual:

- Getting started with **LiteracyPro Reporting**
- Creating reports with the report builder
- Running reports
- Sharing and modifying reports
- Publishing reports to popular formats such as Excel, Word, and PDF
- Tutorials to help you get started

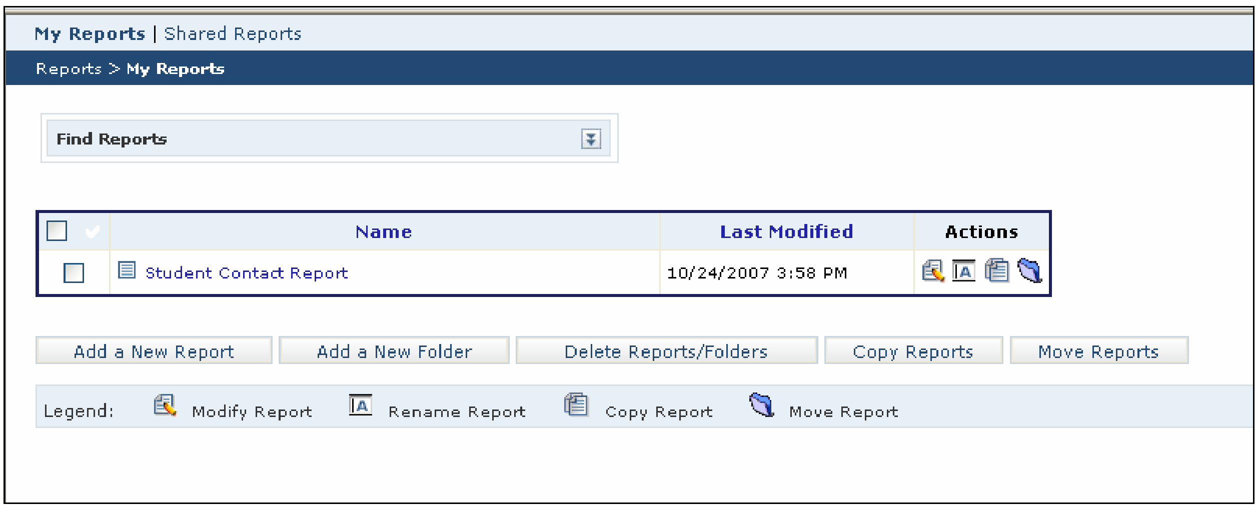
CHAPTER 1 – GETTING STARTED

LEARNING THE INTERFACE

1. Login to LACES using your assigned username and password.
2. Click the User tab.
3. Click Reports.

After clicking Reports, the **LiteracyPro Reporting** interface will appear in the LACES window.

LiteracyPro Reporting Interface



- **My Reports –** Displays the report interface
- **Shared Reports –** Share reports with other users in your database
- **Reports** – List of reports created by the user
- **Add a New Report –** Create a new report
- **Add a New Folder –** Create a folder to organize reports

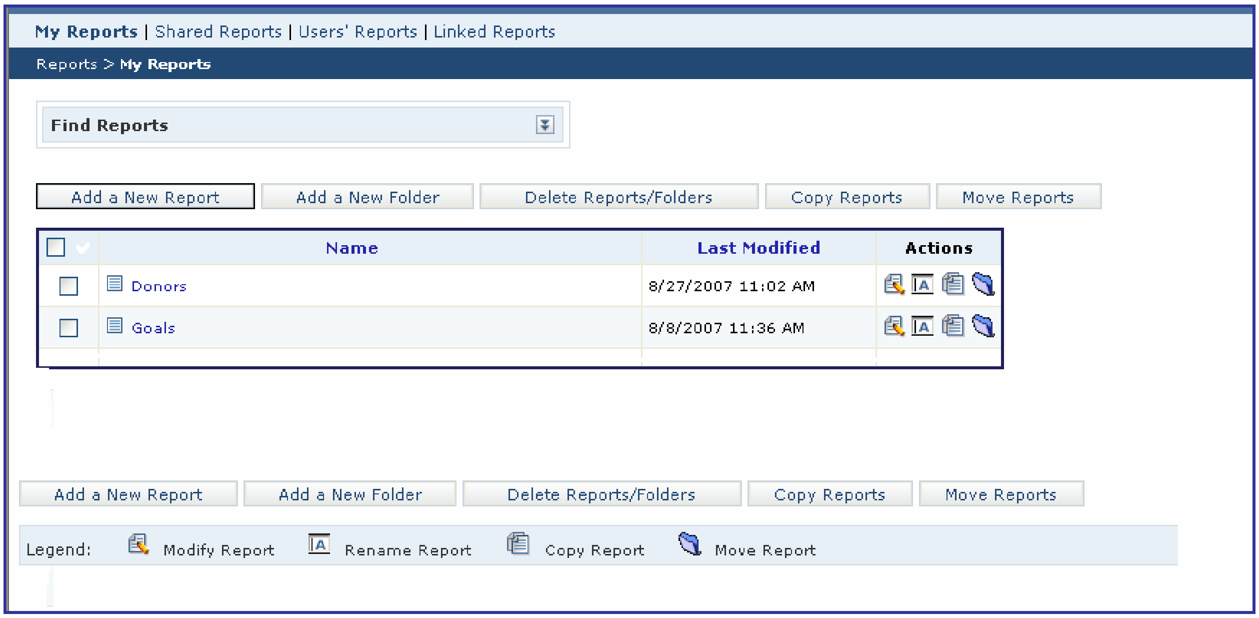
After a new report has been created, additional choices are available.

- **Delete Reports/Folders** – Deletes selected reports or folders
- **Copy Reports** – Copy reports to a selected folder
- **Move Reports** – Move reports to a selected folder

My Reports Page

The **My Reports** page lists your private reports. Other users of **LiteracyPro Reporting** cannot view or modify private reports without special permissions assigned by the system administrator. The **Shared Reports** page lists reports that are available for all users. Users can make changes to shared reports by copying them from the Shared Reports page to the My Reports page.

My Reports page



Reports that have been created will appear in a list on the My Reports and the Reports page. To modify, rename, copy, move, or delete a report, place a ✓ in the box preceding the report name and click the appropriate icon or button. A legend explaining the action icons displays at the bottom of the screen.

To run a report, click on the report name.

Folders

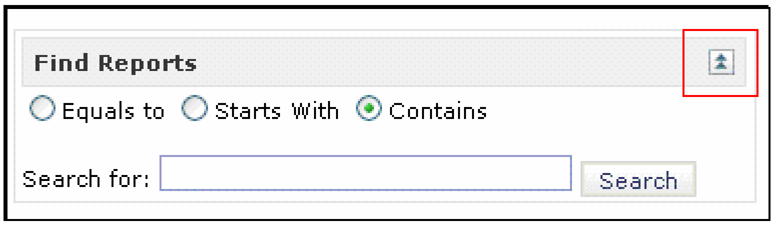
Folders make it easy for you to organize a group of related reports. Click **Add a New Folder** to create new folders to store reports. Click the name of the folder to view any reports contained within the folder.

Find Reports

As more and more reports are created, the My Reports page can become quite long. The search engine will help you find the reports you need more quickly.

The search engine is hidden by default. Click  to expand the search engine interface.

Search Engine Interface



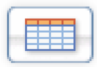
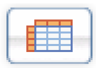
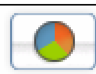
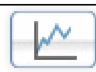
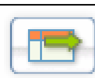
You can search for the report name or a portion of the report name by selecting one of the Find Reports option buttons and clicking Search.

- Equals to
- Starts With
- Contains

NOTE: Folders may appear in the list of results if one or more reports contained within the folder match the search criteria.

The Report Builder

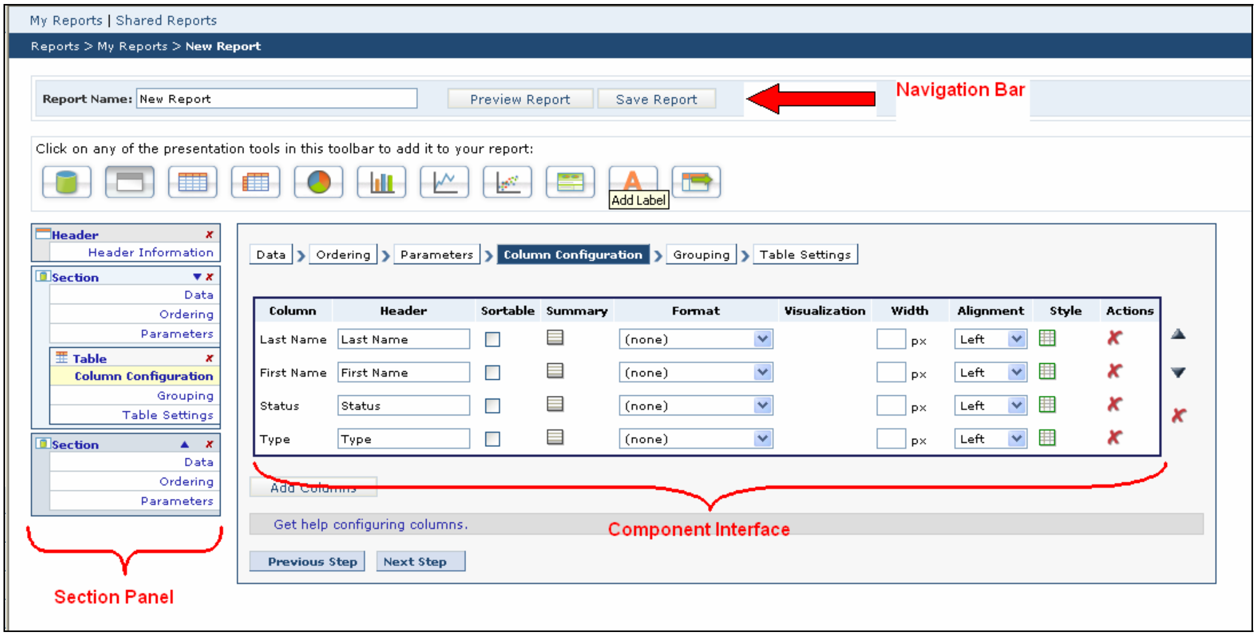
The Report Builder is a comprehensive and flexible interface to build full-featured ad hoc reports. You create reports by adding and configuring different report components. **LiteracyPro Reporting** provides the following report components:

• Section Data	
• Add Header	
• Table	
• Crosstab	
• Pie Chart	
• Bar Chart	
• Line Chart	
• Scatter Chart	
• Label	
• Export Options	

Report components are organized into individual section panels that contain all the data needed to populate those components.

TIP: After an extended period of inactivity, the web server will end your session. It is a good idea to SAVE your report often to avoid losing your work.

The Report Builder Interface with Column Configuration selected



You can create and configure an unlimited number of section panels, and then rearrange the report layout using the controls provided. When you have finished building your report, type a name for the report in the field provided and click **Save Report**.

You can preview the report at any time by clicking **Preview Report** above the Report Builder interface.

NOTE: The Report Builder remembers your changes throughout the report creation process. However, clicking away from the report builder interface, such as clicking one of the links at the top of the page, or clicking a LACES tab along the left side, will discard any changes that were not previously saved. REMEMBER TO SAVE OFTEN.

CHAPTER 2 – SECTION DATA

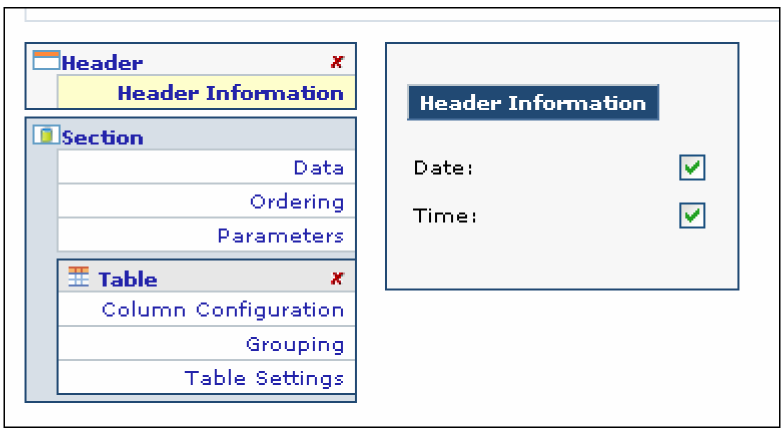
ADD A NEW REPORT

Click Add a New Report.

Section Header

The Header section allows you to display the date and time in your report. If you do not want either of those to display, uncheck the box next to the selections.

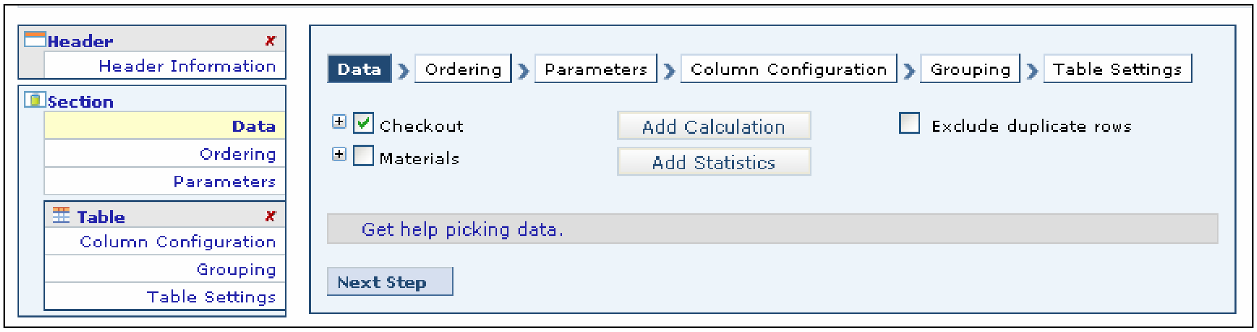
Section Header



Adding Section Data

The Section Data component allows you to select, order and filter data for your report. Data selected for reporting is cascaded down to all report components within that section. For example, if you have Table and Pie Chart components within one section, those components only have access to the data selected for their section.

Section Data



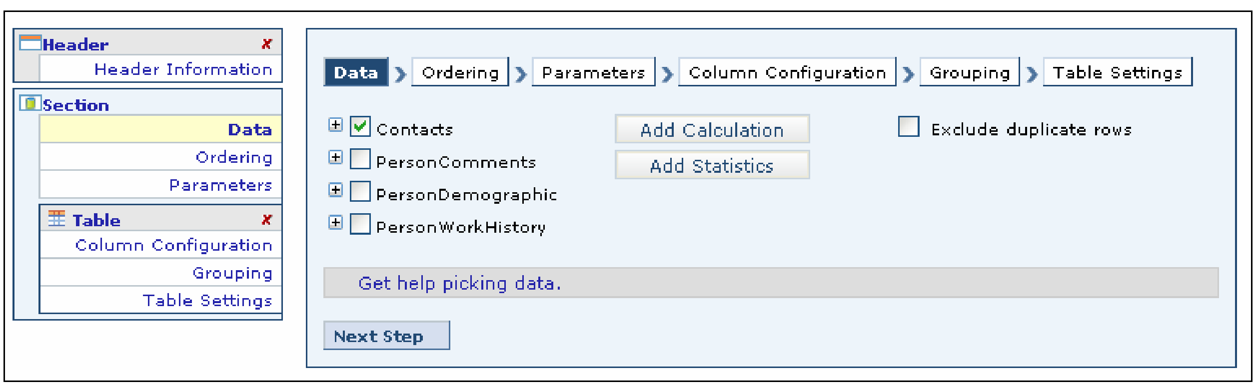
NOTE: The Ordering, Parameters, Grouping and Table Settings steps are optional.

Selecting Report Data

Section Data displays a list of all available data objects to choose from. The data object(s) selected on this step will become available to all reporting components within the current selection. You can expand each data object to view a list of available data columns by clicking the + in front of the data object.

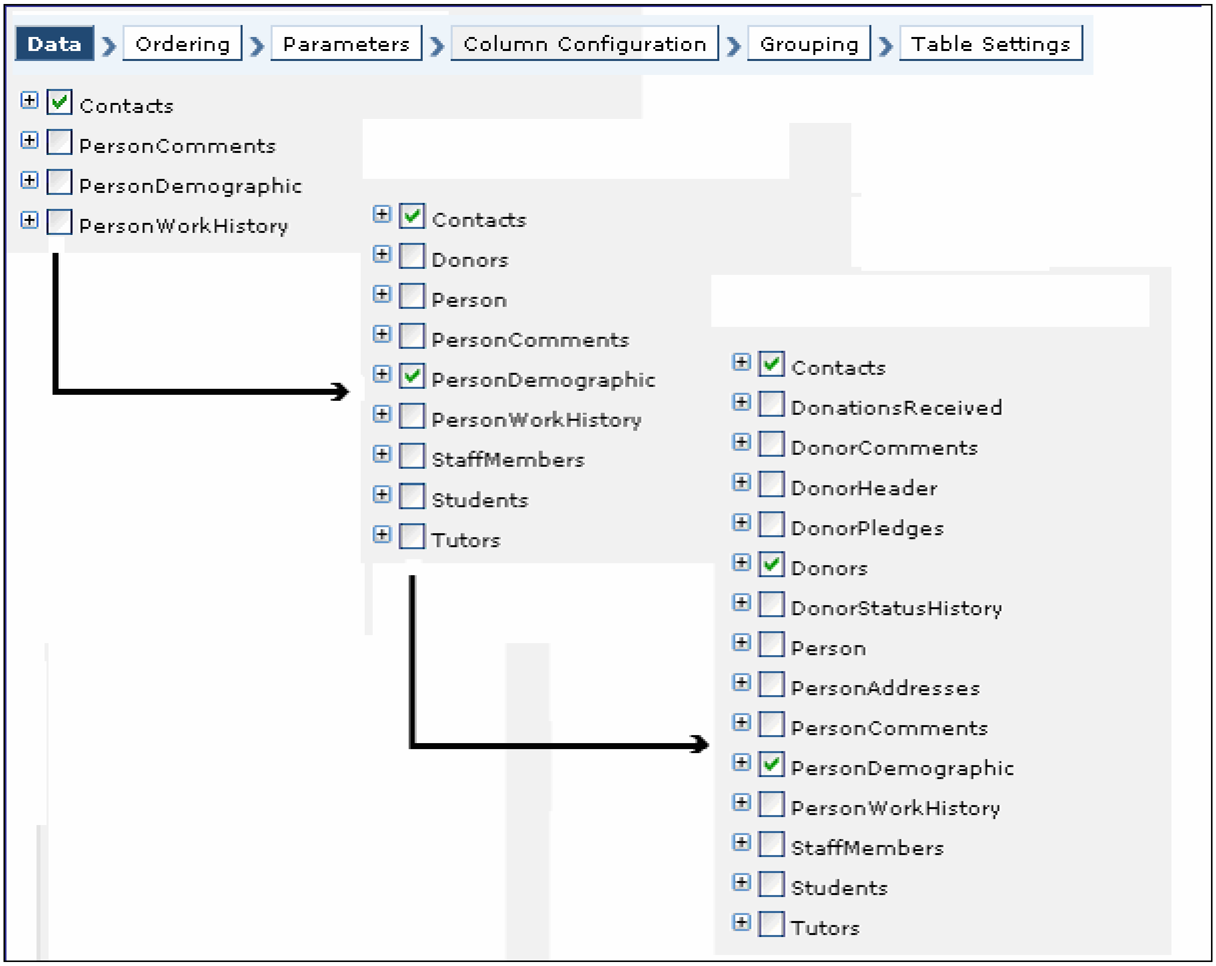
For example, if you were building a report based on an agency's Contacts, place a ✓ in front of the Contacts data object.

Contacts Selected



The Report Builder makes the process of building tables, charts and other components easy by limiting the number of data objects you can pick in one section. After selecting a data object for your report, all the remaining data objects may disappear from the screen. ***Any remaining objects that are still visible must have a relationship to the object previously selected.*** You can then choose to include those objects as well.

Contacts Data Object



The ***Contacts*** data object is related to the ***PersonDemographic*** object, which is related to the ***Donor*** object. Data columns from each object are available to include in the report.

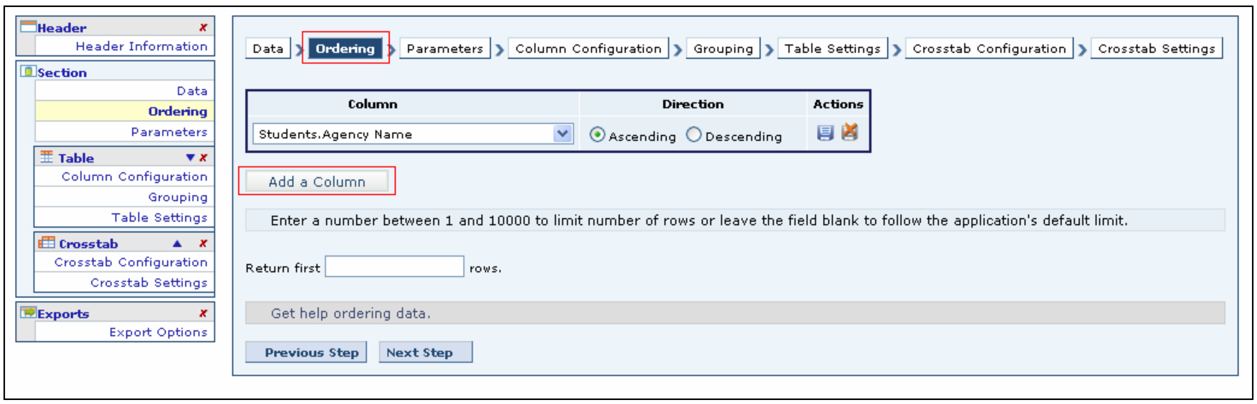
NOTE: More information on data objects can be found in Appendix A.

Ordering Data

Columns in the report can have an initial ordering scheme. Users can also specify a threshold for the number of data rows included in the report.

1. Click Ordering.
2. Click **Add a Column** and choose the column to order from the drop-down menu.
3. Choose **Ascending** or **Descending** order for values in the specified column.
4. After selecting both the column and direction of ordering, click to save or to discard the changes. Click to eliminate a specific column from ordering.

5. Click **Add a Column** to assign order for additional columns.



TIP: The ordering of columns is hierarchical. The report is sorted by the first column for the initial ordering. If a tie exists between two records, the report is sorted by the second column chosen for initial ordering, and so forth.

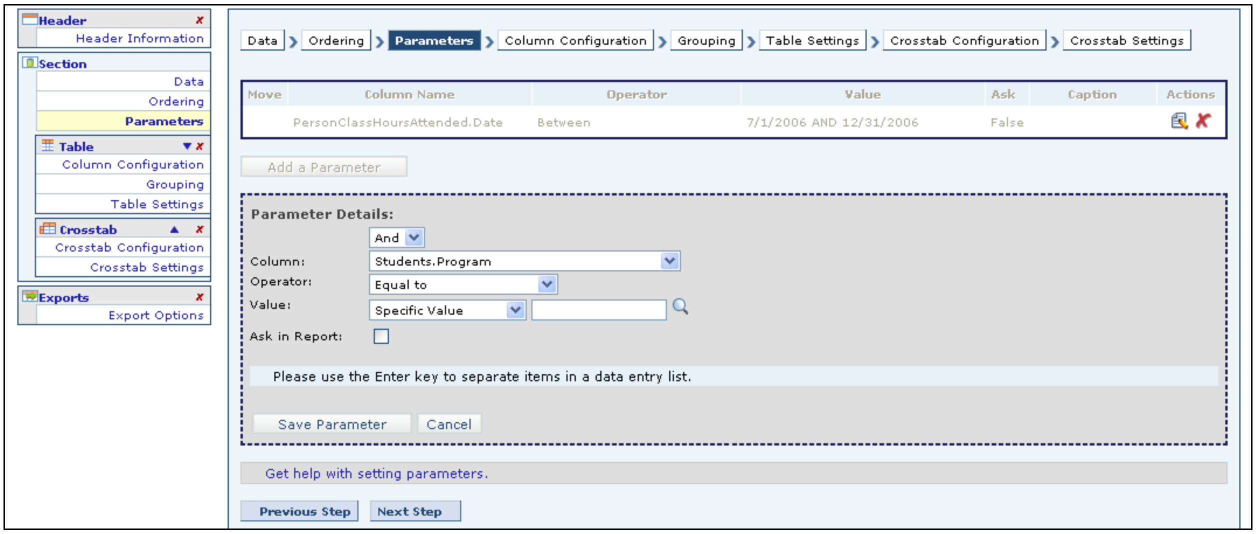
Setting Parameters

Information can be filtered from the report by setting parameters. This will exclude certain records from the report based on the parameters that have been set.

1. Click **Parameters.**
2. Click **Add a Parameter**. The Parameter Details window appears with several options available.

NOTE: If no parameters are set in a report, the report will display data from the entire database.

Add Parameter details window



A parameter takes the form of an equation similar to:

Label is ***Compared*** to ***Value***

where ***label*** represents a column name, ***compared** to* represents a comparison operator, and ***value*** represents a threshold.

Operators are one of the following:

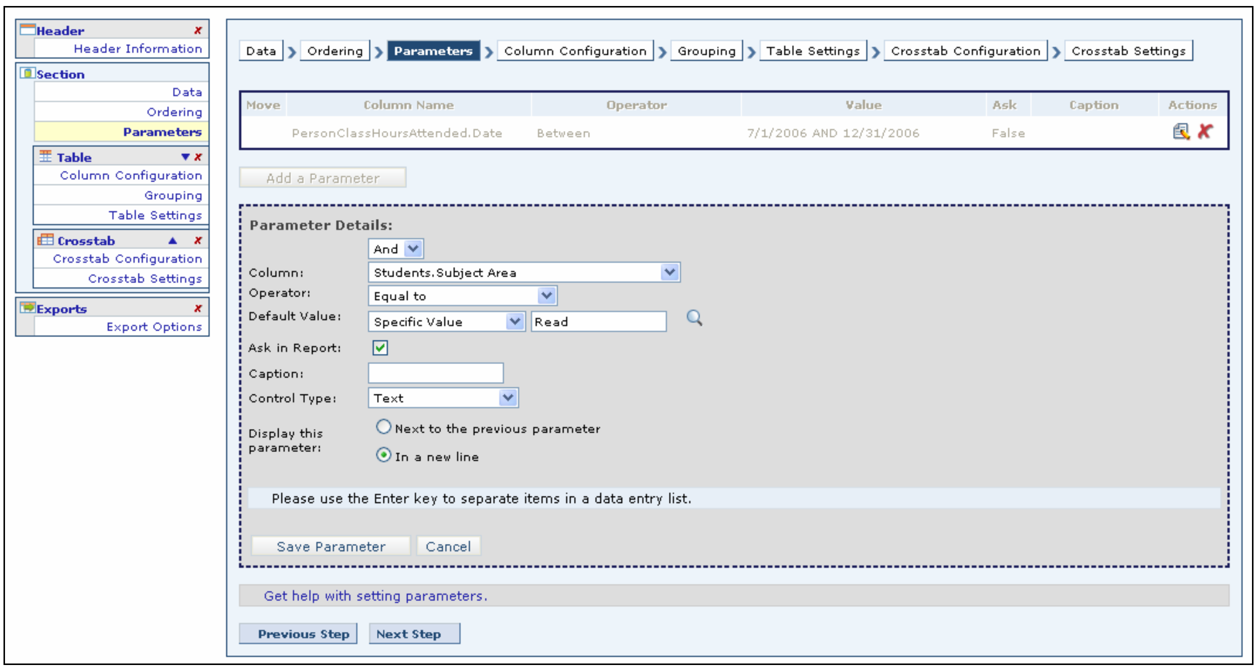
- Equal to
- Not equal to
- Less than
- Greater than
- Less than or equal to
- Greater than or equal to
- Starts with (string or text field only)
- Does not start with (string or text field only)
- Ends with (string or text field only)
- Does not end with (string or text field only)
- Contains (string or text field only)
- Is null
- Is not null
- Between
- Not Between
- In list
- Not in list

The operators available are dependant upon the column's data type. For example, a numeric data type would not include operators such as **true/false**.

To set a data parameter:

1. Select the column name to filter from the drop-down menu.
2. Choose the comparison operator from the drop-down menu.
3. Define a threshold value in the Value field.
4. Click **Save Parameter** to add the parameter to the report.
5. Add more parameters by clicking **Add a Parameter** and repeating steps 1-4.

Setting a Parameter



Ask Checkbox

Place a ✓ in the Ask checkbox to give the viewer the option of changing the threshold value before the report is presented. Instead of limiting the report to predefined parameters, the values can be modified while browsing the report.

Marking an operator as an "ask" parameter presents additional options, such as setting the desired caption for the parameter and changing the way values are displayed. The parameter caption will be automatically generated if left blank.

Control Type values depend on both the operator picked and the selected column's data type. For example, a text type column with the Equal To operator presents the following choices:

- Text
- Dropdown
- List (single-select)

The Contains operator presents the following choice:

- Text

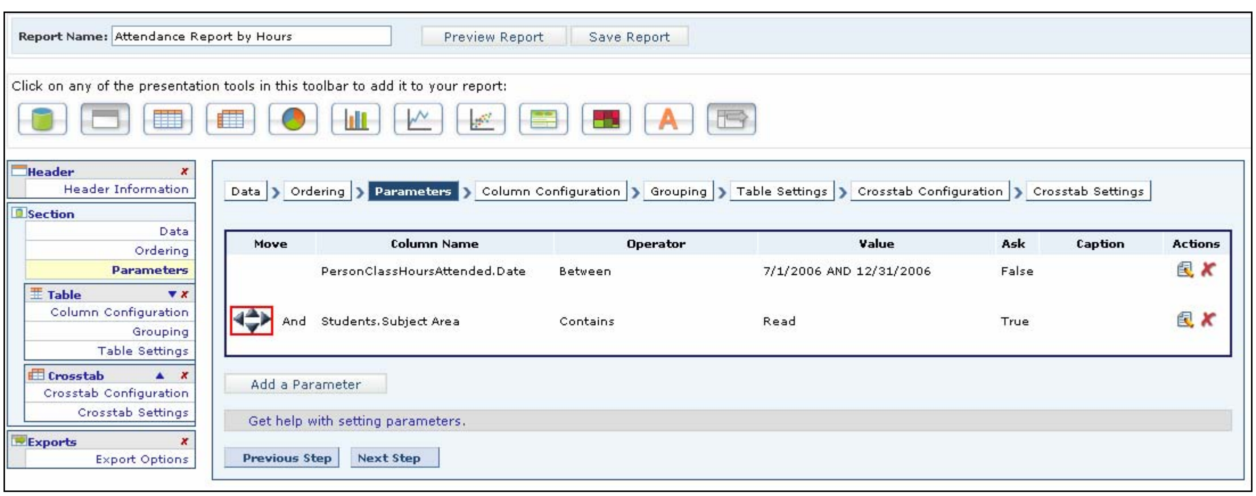
If more than one parameter is used, the user has the option to display parameters adjacent to the previous one, or display on a new line. Select either:

- Next to the previous parameter
- In a new line

Parameter Display Options

If the report contains two or more parameters, an icon appears for each additional parameter. The directional pad gives users the ability to create *levels* for each parameter. Control the order of evaluation for multiple parameters using the directional pad.

The Directional Pad



Advanced Data Filtering

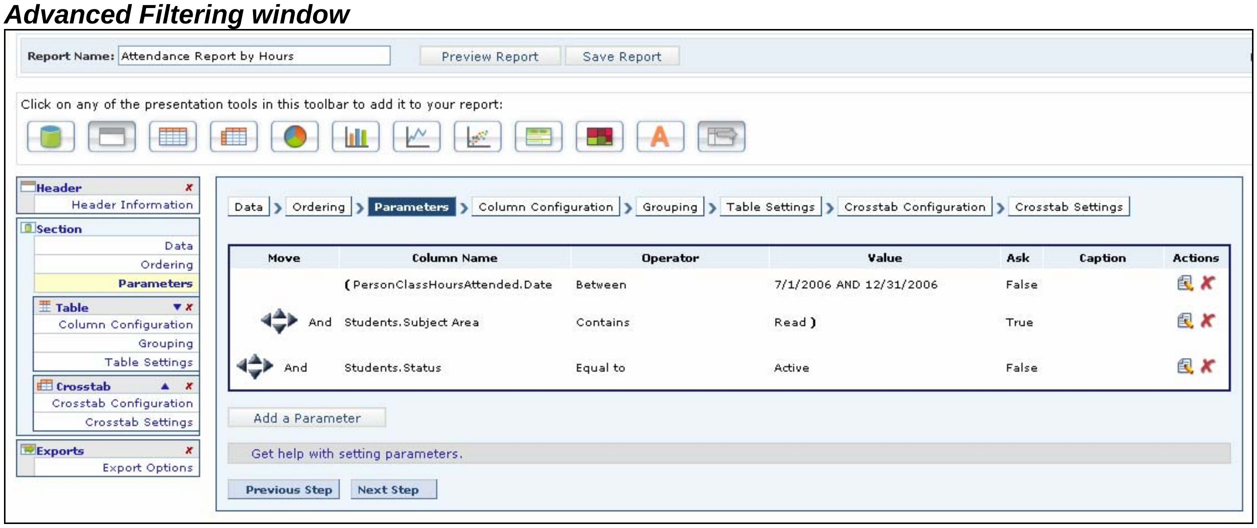
Advanced Data Filtering makes it possible to define groups of parameters that work together to filter undesirable data from the report. Users can define multiple parameters and control the order of evaluation. Filter report data to control what users see at runtime.

Data filtering gives users the ability to control the content of the report. Filter extraneous data from the report by defining one or more parameters that are evaluated at runtime. The directional pad control enables users to control the order of evaluation.

The individual arrows of the control perform the following functions:

- ▲ Shifts a parameter one position higher in the list (retains indentation)
- ▼ Shifts a parameter one position lower in the list (retains indentation)
- ◀ Indents a parameter one position left
- ▶ Indents a parameter one position right

Advanced Filtering window



As parameters are indented to the right, enclosing parentheses appear to indicate the order of evaluation. In the above example, parameters 1 and 2 are evaluated first.

NOTE: Parameters indented furthest to the right are evaluated first.

*See **Running Reports, Chapter 11,** for more information.*

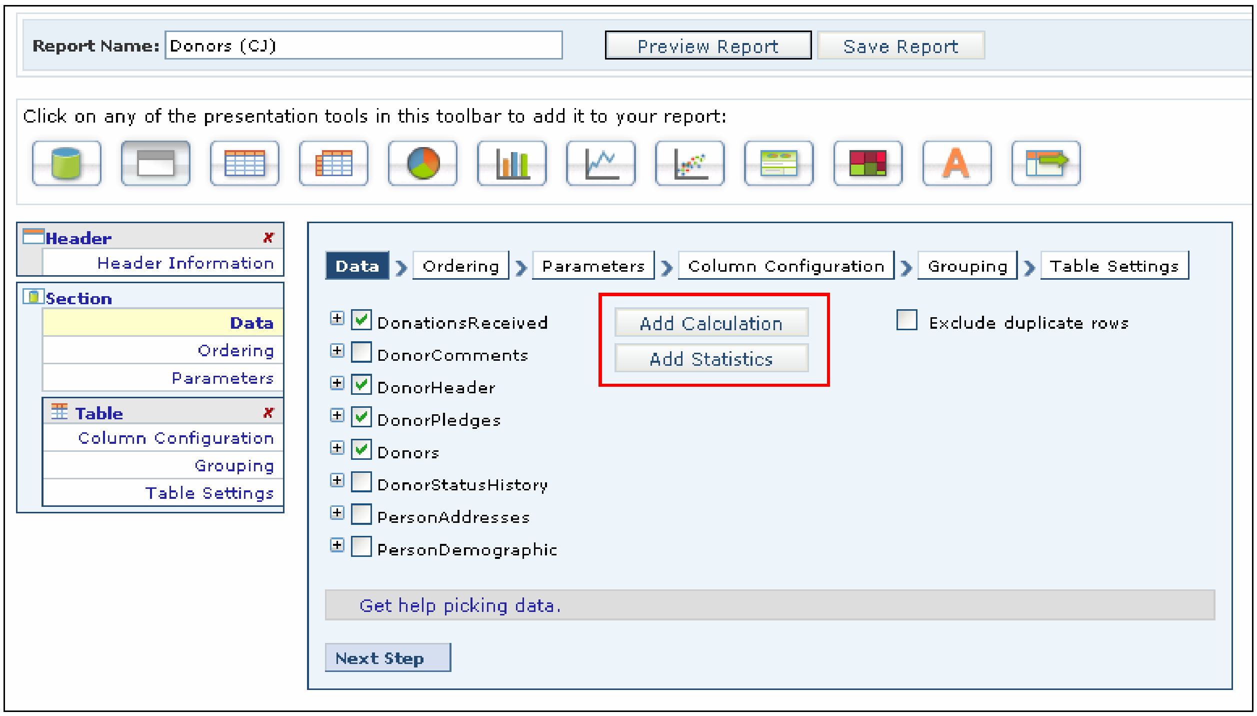
CHAPTER 3 – CREATING DATA COLUMNS

CUSTOM DATA COLUMNS

LiteracyPro Reporting gives users the ability to create custom data columns. Custom data columns can either be a **calculation** or a **computed statistic** from data in other columns.

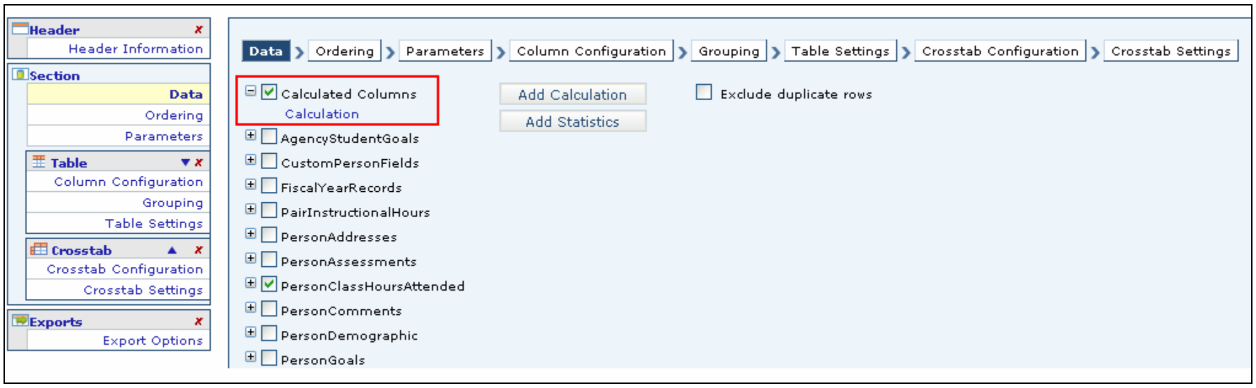
Go to **Data**, and click **Add Calculation** to create calculated columns, or **Add Statistics** to create statistical columns for your report.

Data window to add calculation or statistics



Any statistical columns created are added to the Statistical Columns data object, and calculated columns are added to the Calculated Columns object. You can edit these columns by clicking on the links provided.

Calculated Columns Object



Creating Calculated Columns

Calculated Columns give users the ability to create new columns for the report based on a specified formula applied to data from existing columns. Users can apply formulas to numeric and non-numeric, and date types. Calculated columns are published with the main columns of the report at runtime.

In addition to columns available from the data source, the user can create customized columns that consist of calculations performed on data from other columns in the report. Calculations are performed with date, numeric and non-numeric data types. The operands of the formula are either constants or the names of existing data columns included in the report. Users can create formulas from the six provided operators or utilize any function supported by the source database.

TIP: Formulas are validated before the column is added to the report. A message appears if the formula entered is invalid.

The new calculated columns are identical in appearance to other columns in the final report. Calculated columns are also exported and archived along with other content that appears in the report.

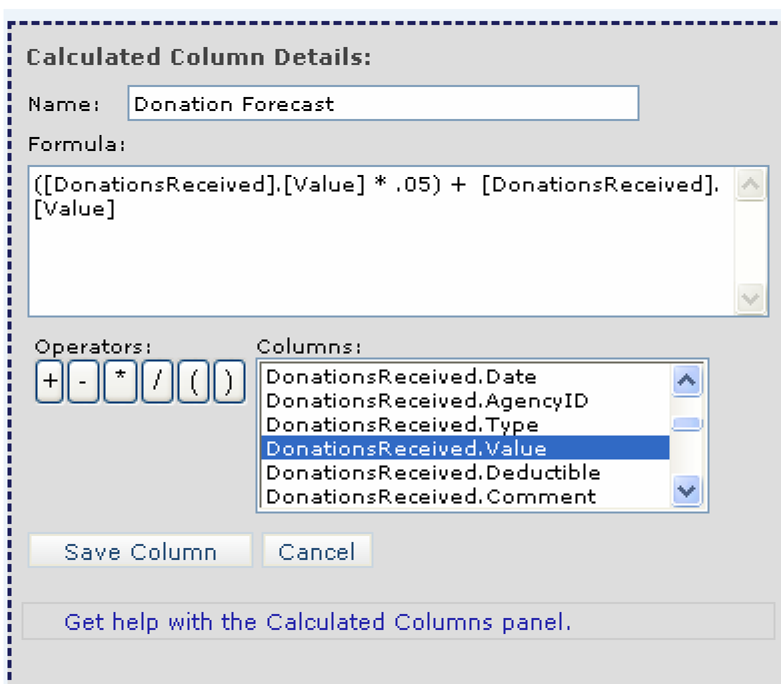
Example:

An agency wants to create a report that forecasts the amount of donor pledges they expect to receive in a new fiscal year based on donations from the current fiscal year. The agency forecasts that each donor will contribute at least 5% more than their original pledge.

1. Click Data.
2. Click Add Calculation.
   - Enter a name for the calculated column.
   - Enter a formula by double-clicking on a column in the list, and build the formula from there.
     - o Add parentheses for the function to be performed first:

       *Donations received * .05*
     - o This amount will be added to Donations Received

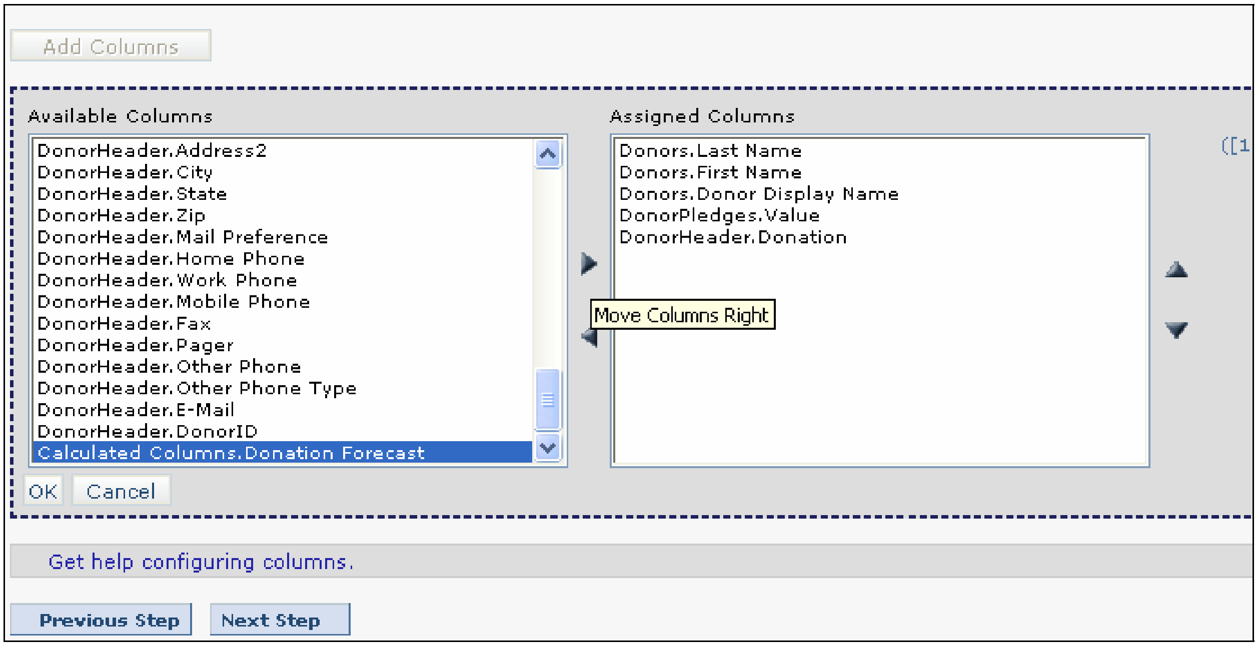
   - Use the operators where needed.
   - Click Save Column.



3. Add the newly created Calculated Column by clicking **Column Configuration**, then **Add Columns** (*for more information about Tables and Adding Columns, refer to Chapter 4).*

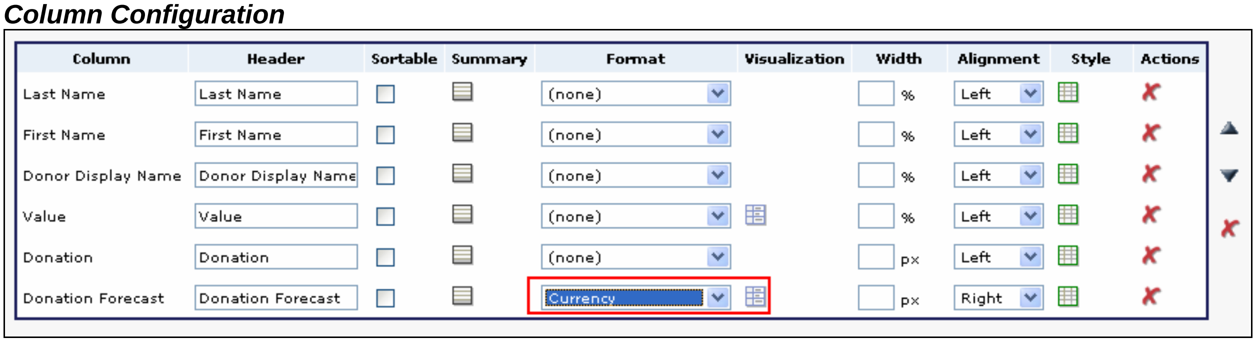
- Using the Control key, select the columns to appear in the report, including the Calculated Column.
- Click OK.

Table and Add Columns



4. Format Columns if needed.

Column Configuration



5. Save report.
6. Click on Report name in Report list to run.

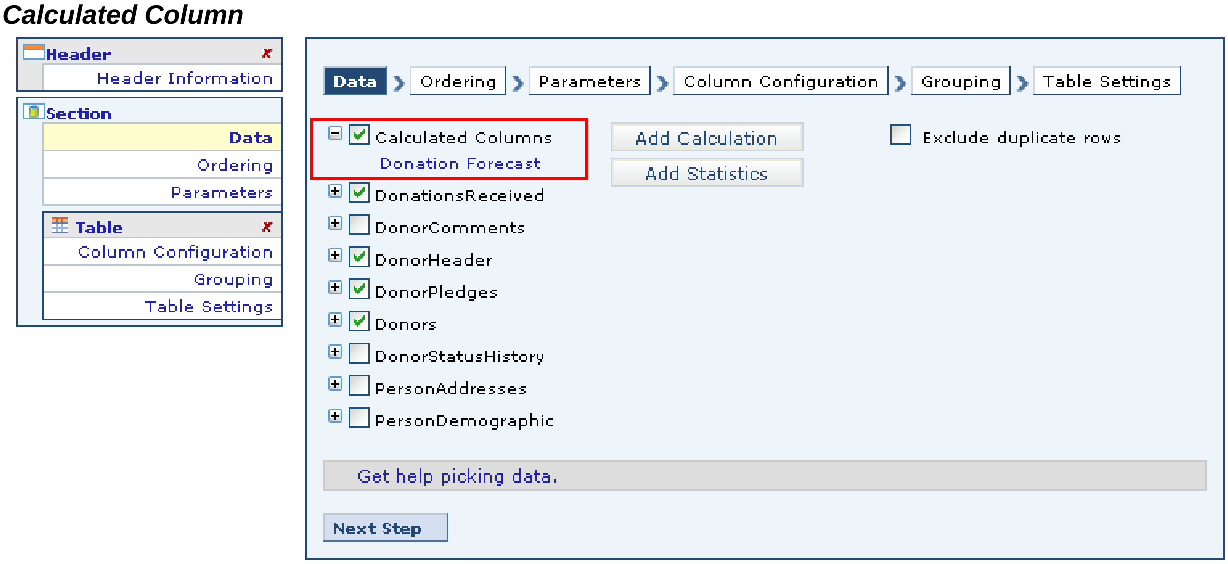
Report with Calculated Columns

Donor Display Name	Value	Donation Forecast
Steve ForbesP	500.00	$525.00
Steve ForbesP	100.00	$105.00
James PolkP	100.00	$105.00
James PolkP	50.00	$52.50
William HarrisonP	400.00	$420.00
William HarrisonP	555.00	$582.75
William HarrisonP	100.00	$105.00
James Madison	350.00	$367.50
James Madison	0.00	$0.00
James Madison	75.00	$78.75
Grover Cleveland	1000.00	$1,050.00
Grover Cleveland	100.00	$105.00
Grover Cleveland	85.00	$89.25
Grover Cleveland	100.00	$105.00
Andrew Jackson Society	25.00	$26.25

Editing a Calculated Column

1. In the Reports list, place a ✓ in the box in front of the report name.
2. Click the Modify Report icon.
3. Click Data.
4. Click the + in front of Calculated Columns
5. The new column name appears as a link. Click the link to edit the calculation.

Calculated Column



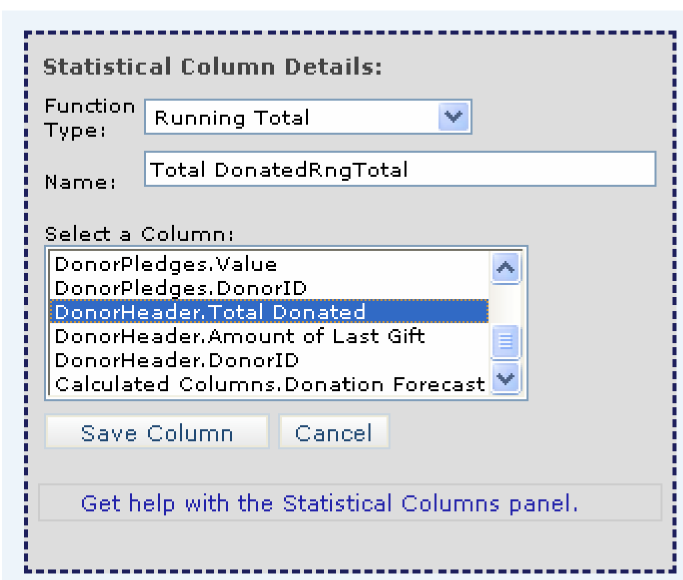
Statistical Columns

Statistical Columns give users the ability to create new columns for the report based on a particular statistic from data in other columns. Statistical columns are published with the main columns of the report at runtime. The following statistical column types are supported with **LiteracyPro Reporting**:

- Rank
- Reverse Rank
- Percentile
- Running Total
- Difference from Previous

To create a statistical column:

1. Click Data, then Add Statistics.
2. Choose one of the five functions from the Function Type drop-down menu.
3. Keep the default name for the statistical column or type a new name in the field provided
4. Select the column from the data source to use as the data column – the function selected is applied to the values contained within this column.
5. Click **Save Column** to add the statistical column to your report.



Rank

The Rank column classifies data from an existing column in the report. Data is ranked from the lowest value to the highest value. When one or more data rows have equal values, the rank value is the same for each row.

Reverse

The Reverse Rank column classifies data from the highest value to the lowest value; a larger value receives a higher rank.

Percentile

The Percentile column classifies data based on a percentage of the value distribution.

Running Total

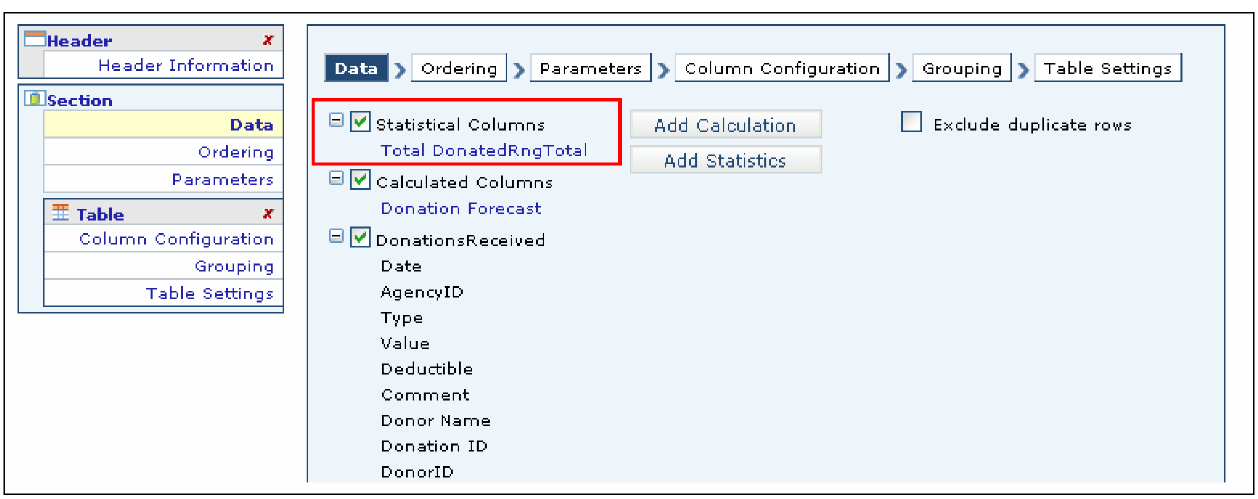
The Running Total column maintains a current total of values provided in the specified column.

Difference from Previous

The Difference from Previous column displays the difference from the current value and the previous value of a specified column.

Editing a Statistical Column

1. In the Reports list, place a ✓ in the box in front of the report name.
2. Click the Modify Report icon.
3. Click Data.
4. Click the + in front of Statistical Columns
5. The new column name appears as a link. Click the link to edit the statistic.



CHAPTER 4 - TABLES

TABLES

A ***table*** presents data in a tabular style report. A column is created for every data column that you include in the report, and a row is created for every value in that data column.

Building a table is a 3-step process:

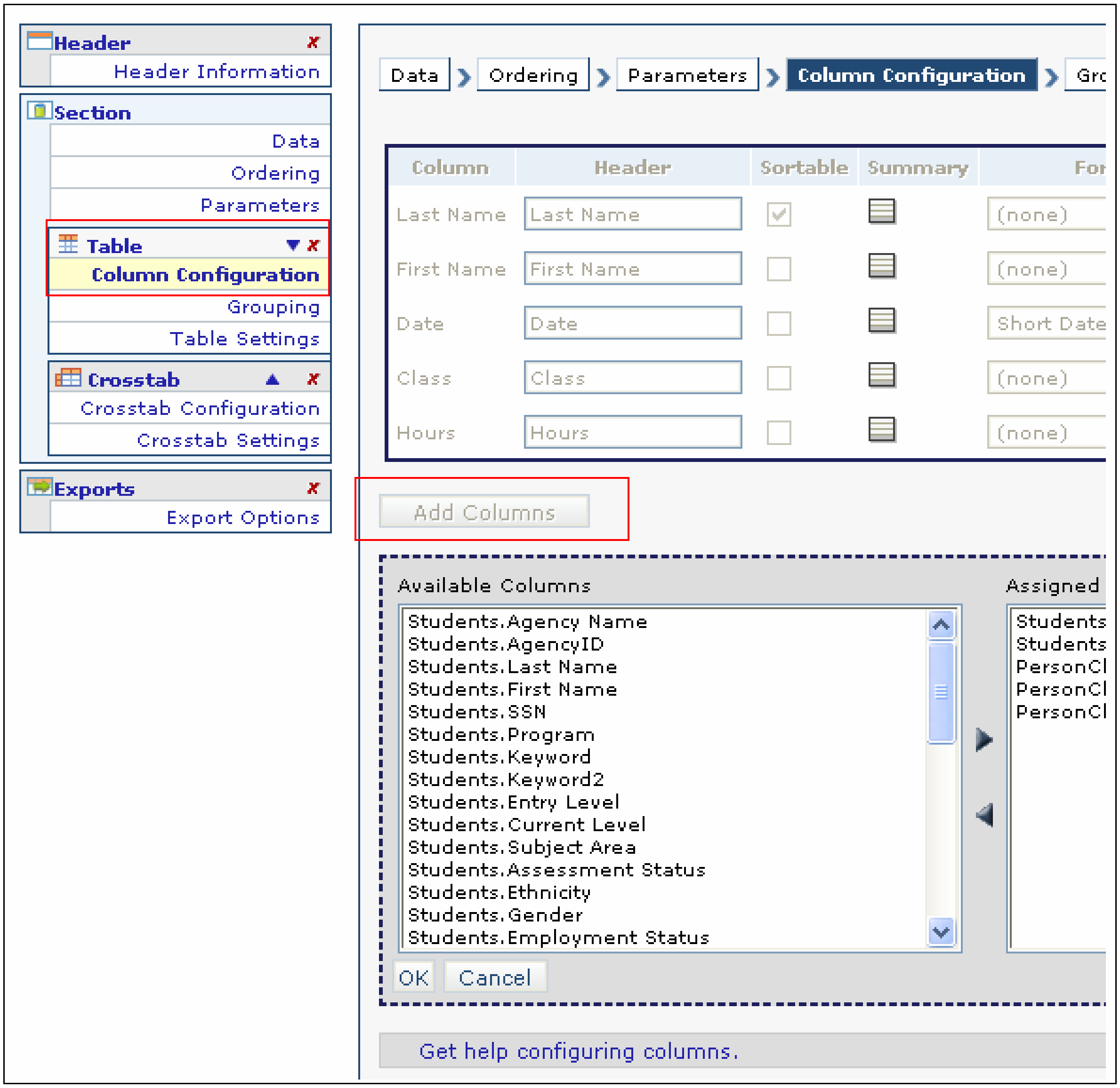
- **Column Configuration** – select and configure the table's columns
- **Grouping** – create a flat-table or drill-down style grouping
- **Table Settings** – configure table settings such as interactive paging

NOTE: The Grouping and Table Settings steps are optional.

Configuring Table Columns

The first step is to create and configure columns for your table. Create columns for your table by adding data columns configured in the Section Data component. Click **Table Configuration** to open a panel listing all the available data columns. After selecting the columns, click **OK**.

Adding Columns



TIP: Select one or more columns and then click OK to add those columns to the table. Hold the CTRL key down to select multiple columns.

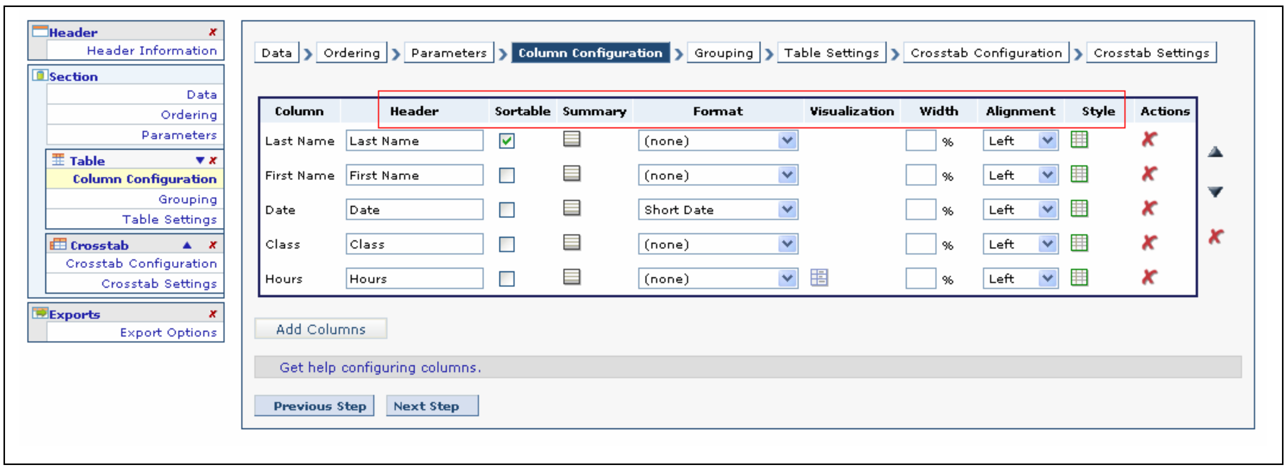
NOTE: You must select at least one data column.

Formatting Columns

After adding columns to the table, you can begin formatting the appearance of each column. There are 8 formatting options available in Column Configuration:

- Header
- Sortable
- Summary
- Format
- Visualization
- Width
- Alignment
- Style

Column Formats



Header

The **Header** option gives each column an alternative label. For example, the column named Last Name in the example above can be displayed in the report as *Student Last Name.* Type the new name for each column in the corresponding Header fields. Using the **Header** feature can make the report easier to read and understand.

Sortable

The **Sortable** option lists data in ascending or descending order while browsing a completed report. To add the sorting capability, place a ✓ in the Sortable checkbox next to the column you wish to sort by. Headers for sortable columns are highlighted in the report. In the example above, Last Name will be sortable.

Summary

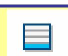
The **Summary** option gives you the ability to create table footers containing aggregates of values for each column of data. You can create an unlimited number of aggregates for each table column. The following aggregate functions are supported:

- Sum
- Average
- Standard Deviation
- Count
- Distinct Count
- Maximum
- Minimum

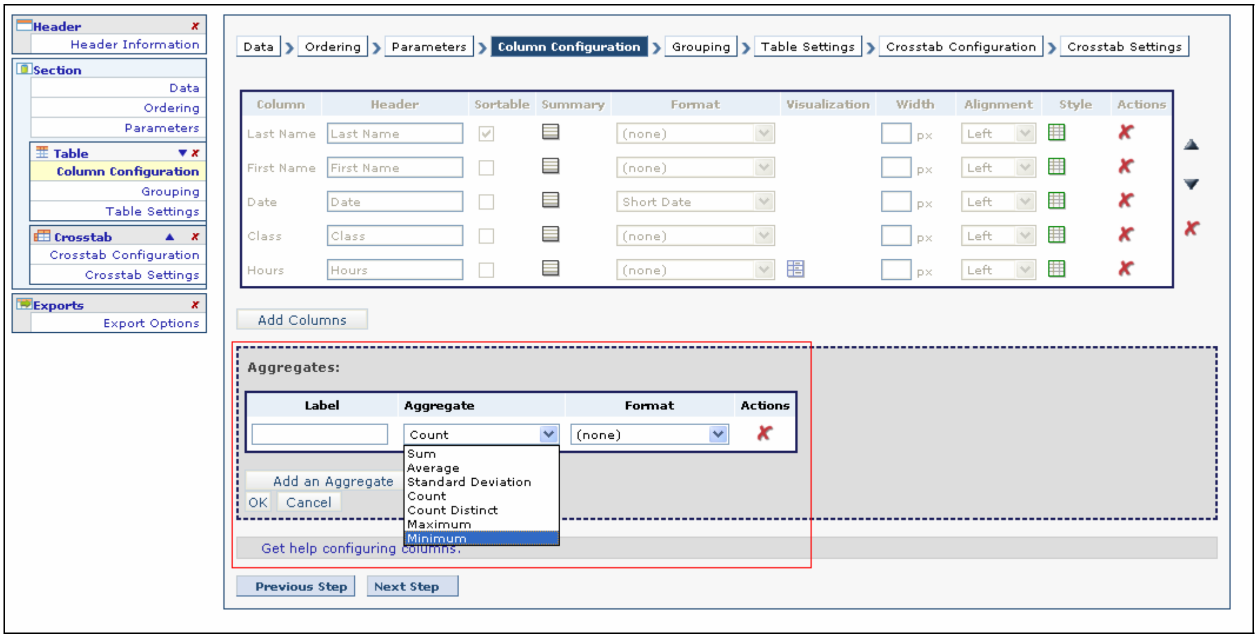
For example, in the above example, you can add a summary to display the number of student who display on the report.

To add a summary

1. Click the Summary icon next to the line you wish to aggregate.
2. Click Add an Aggregate.
3. Enter a label for the summary field.
4. Select an aggregate function from the drop-down menu.
5. Select a format.
6. Click OK.

NOTE: The  icon indicates that at least one summary value exists for that particular column.

Adding a Summary Value



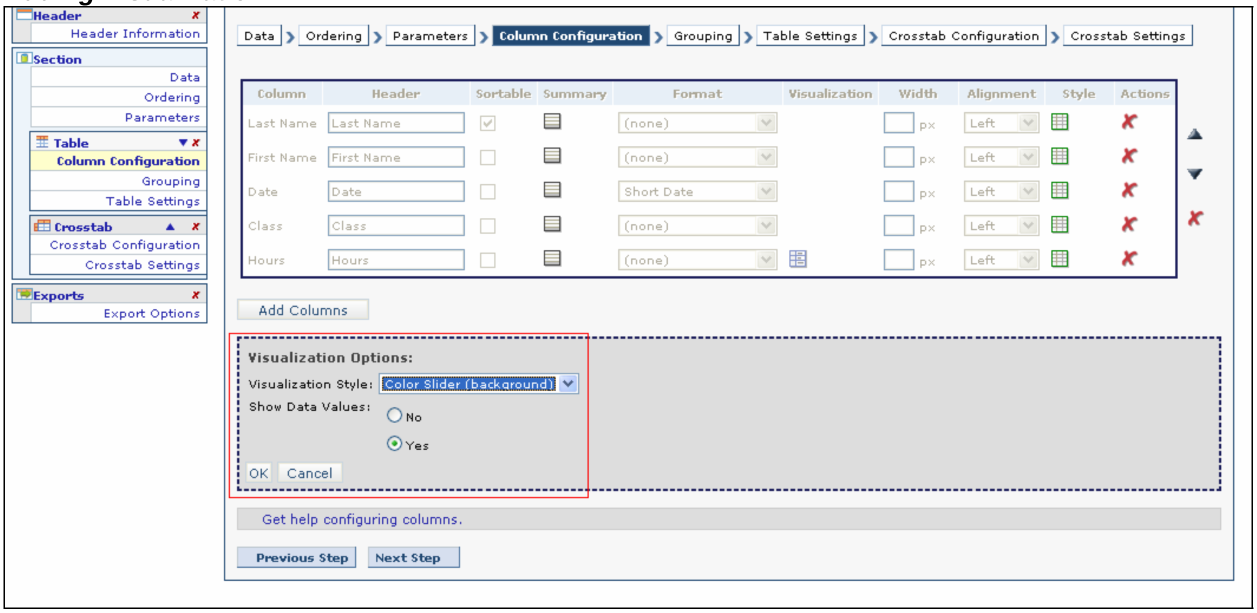
Visualization

The **Visualization** option allows you to display a colored indicator for ***numeric*** fields. The following indicators are available:

- Bar
- Color Slider (background)
- Color Slider (circle)
- Color Slider (square)

If the field is numeric, the Visualization icon will appear. 

Adding Visualization



Color indicators give you the ability to define your own threshold for comparing a value at a particular row with all other values in that column. When you enable visualization on a particular column, a color slider appears in the column header for setting the threshold. The **color spectrum** is determined by how much the data values in the column deviate from the specified threshold. You can choose to visualize each cell value as a colored shape bar, circle or square or shade the entire cell background. You can also show the numeric data value adjacent the visualization.

Example of Report with a Calculated Column Formatted with Visualization

DONOR PLEDGES

Donor Display Name	Value	Interest
Steve ForbesP	500.00	$530.00
James PolkP	100.00	$106.00
William HarrisonP	400.00	$424.00

Formatting

The **Format** option provides data formatting options for values in each column. The following formatting options are supported:

- (None)
- General Number
- Currency
- Integer
- Fixed
- Standard
- Percent
- Scientific
- 2 or 3-digit place holder
- General Date
- Long/Medium/Short Date
- Long/Medium/Short Time
- Yes/No
- True/False
- On/Off

NOTE: LiteracyPro Reporting chooses the appropriate format type for each column. Changing the format type may display undesirable results.

Width

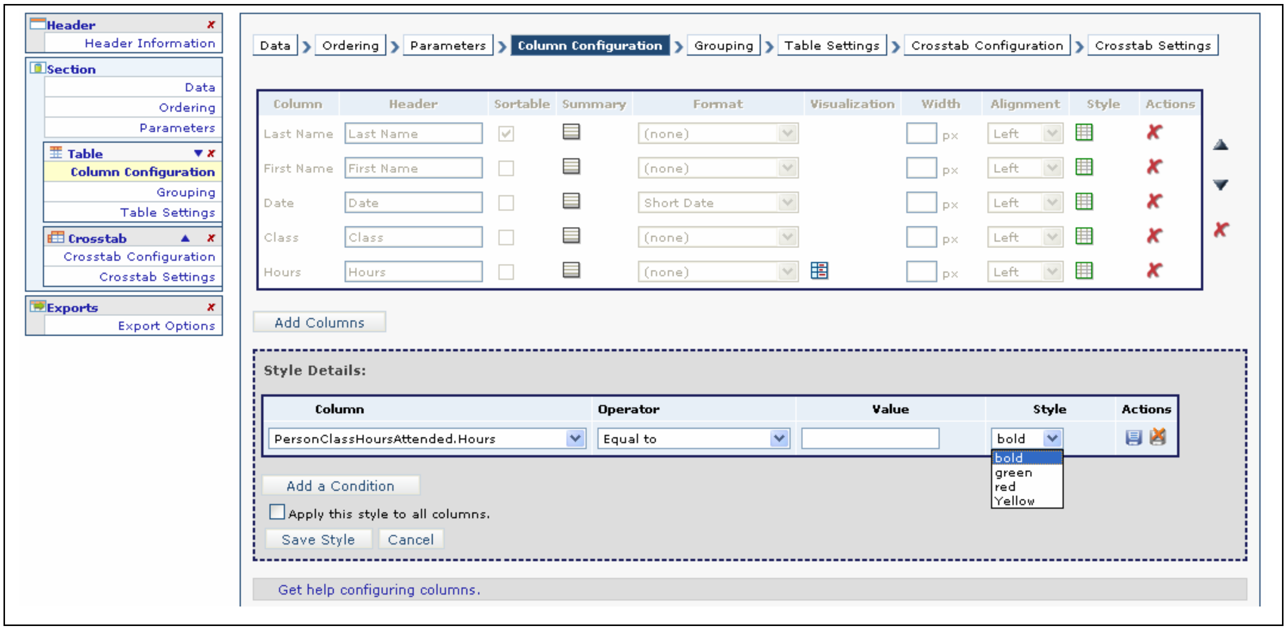
The **Width** option allows you to modify the default width. This value works in conjunction with its *scale* type. Scale is measured in **pixels** or **percent**. A **pixel** is single point of picture data displayed on the monitor. Hundreds of pixels can be used to display a very small image. A **Percentage** is a fraction of the screen space allocated for each column.

TIP: Customizing the width of each table column can improve the appearance of the report. Leave the width field blank to use the default column width.

Style

The **Style** option gives users the ability to apply **conditional formatting** to cells with specific values. Users must create the condition and specify the formatting style. Conditions are evaluated each time other users run your report. Click to modify the conditional style for a specific column.

Adding a Column Condition



In the example above, donation values less than $500 will display red in the report.

To create a condition:

1. Click the Style icon on the line you wish to format.
2. Click **Add a Condition**.
3. Choose the column and operator from the drop-down menus, and then type a value in the field provided.
4. Choose a style from the Style drop-down menu.
   - Bold
   - Red
   - Green
   - Yellow
5. Click **Save Conditions**.
6. The icon indicates that a condition has been applied.

NOTE: To apply the style to all columns, click the checkbox in front of "Apply this style to all columns.

Report Display with a style condition: Instructional Hours less than 5 display in red

Last Name	First Name	Date	Class	Hours
Adams	John			
		10/26/2006	Demo Group	0
		10/30/2006	Demo Group	6
		10/27/2006	Demo Group	5
		11/2/2006	Demo Group	7
		11/6/2006	Demo Group	8
		10/24/2006	Demo Group	0
		10/25/2006	Demo Group	3
				Student Hours 29

Grouping Data

LiteracyPro Reporting provides two styles of grouped reports:

- ***Flat-Table*** - Flat-table reports organize records into groups and hide duplicate entries to make the grouped report more presentable. Use the flat-table style to give other users the ability to export the complete report to different formats such as PDF and Excel.
- ***Drill-Down*** - Drill-down reports organize records into groups and any remaining columns are included in a sub-report. Use the drill-down style to give other users the ability to hide and show sub-reports.

When grouping data:

- The feasibility of grouping data highly depends on the data source chosen for the report.
- A grouped report is not necessarily appropriate when the data is simply a list of customers.
- If your data source contains information about customers and orders, a grouped report will definitely improve the presentation of the report.

LiteracyPro Reporting provides two ways to group data for flat-table and drill-down style reports:

- *Multiple layers*
- *Multiple grouping columns*

Users can combine both methods when creating grouped reports.

Flat -Table Reports

Multiple Layers

Creating grouped reports with multiple layers is useful in scenarios where the report requires more than one grouping to organize all the data. For example, in a student report, you can group by the program, and then group by the keyword.

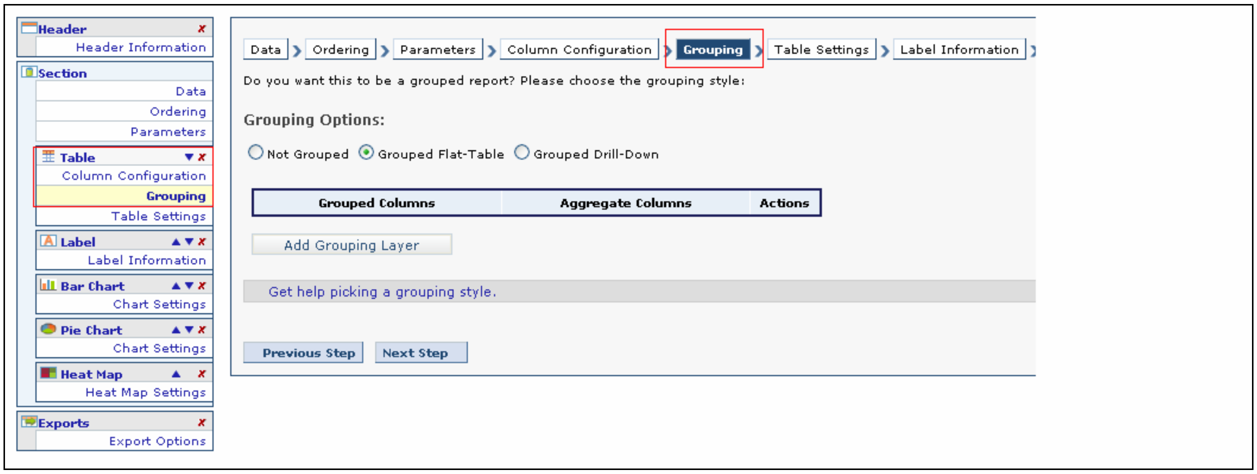
Report Grouped by Program and Keyword Layers

Program	Keyword	Last Name	First Name	Ethnicity	Gender	Employment Status
Adult Ed						
	Dooly					
		James	Michelle	Caucasian	Female	Unemployed
		Vaughn	Sarah	Caucasian	Female	Unemployed
		Brinkley	David	American Indian	Male	Unavailable for work

Report is displayed as a Flat-Table, with grouping layers for Program and Keyword.

.

Screen to create a layer

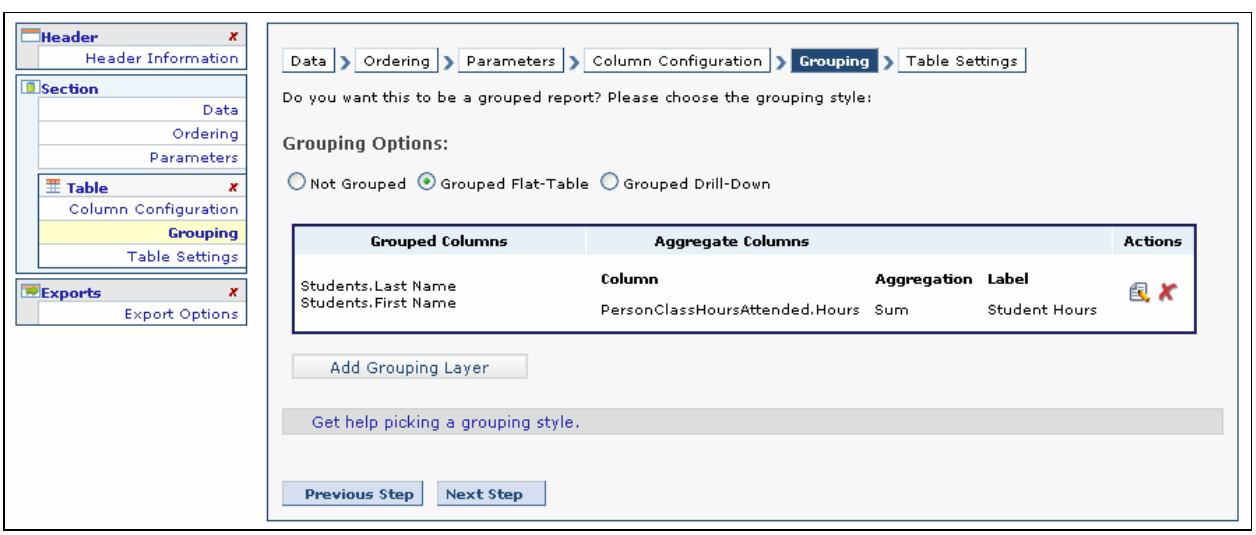


To Create a Layer:

1. Click Grouping.
2. Select Grouped Flat Table.
3. Click Add Grouping Layer.
4. Select an available column and click the  button to move the column into the Grouped Column list.
5. Click Save Layer.

The **Grouping page** keeps track of all the information for each layer, including both grouped columns and group aggregates.

Grouping Page



Multiple Grouping Columns

Multiple grouping columns are useful for displaying more information on a single grouping layer. For example, in a student report, you can group by program *and* keyword, showing both on the same layer.

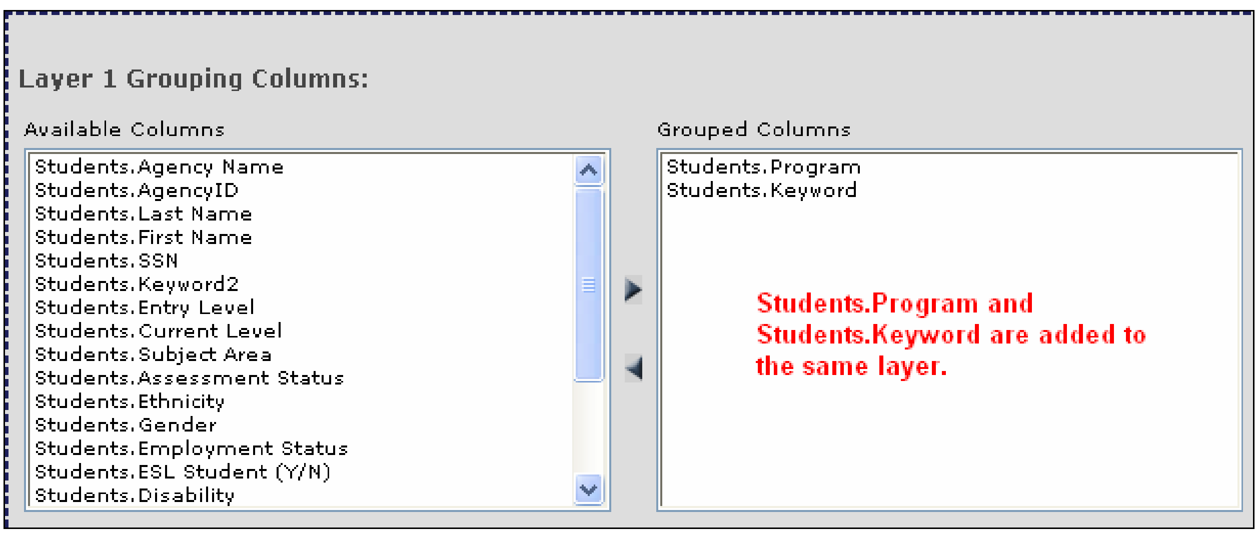
To Create Multiple Grouping Columns1

1. Click Grouping.
2. Select a Grouping Option.
3. Click Add Grouping Layer.
4. Select an available column and click the button to move the column into the Grouped Column list.
5. Click additional columns and add.
6. Click Save Layer.

Remove grouped columns in a similar way. Select the column in the box on the right, and double-click or click the back arrow to move it back to the box on the left.

TIP: Select individual columns by holding the CTRL key down and selecting the columns one by one. To add a range of columns, select the first column, hold the SHIFT key, and select the last column. All columns in between will be selected.

Adding Multiple Grouping Columns



Report with Multiple Grouped Columns on Same Line

Program	Keyword	Last Name	First Name	Ethnicity	Gender	Employment Status
Adult Ed	Dooly					
		Baker	Shirley	Black	Female	Unemployed
		Bakerson	Sandra	Black	Female	Unemployed
		Boudreaux	Kiera	No Value Entered	Male	No Value Entered

Grouped Drill-Down

Drill-down reporting gives you the ability to control the appearance of the report by hiding and showing sub-reports for each record in the **grouping column**. For example, in a student report, Programs could be the grouping column and all other columns appear in a sub-report. Users can show or hide sub-reports for each group of records by clicking the hyperlink provided in the **Details** column.

NOTE: Users can disable drill-down functionality for the Details column or hide the column completely.

To Create a Drilled-Down Report

1. Click Grouping.
2. Select Group Drilled Down.
3. Click Add Grouping Layer.
4. Select an available column and click the ▶ button to move the column into the Grouped Column list.
5. Click Save Layer.

Drilled-Down Report Grouped by Program (Details are Hyperlinks)

Program	Details
Adult Ed	20 Rows
Corrections	4 Rows
Family Literacy	1 Rows
Unassigned	1 Rows
Workplace	2 Rows

Users can customize the behavior of the ***Details*** column when using **drill-down** style grouping. The following options are available:

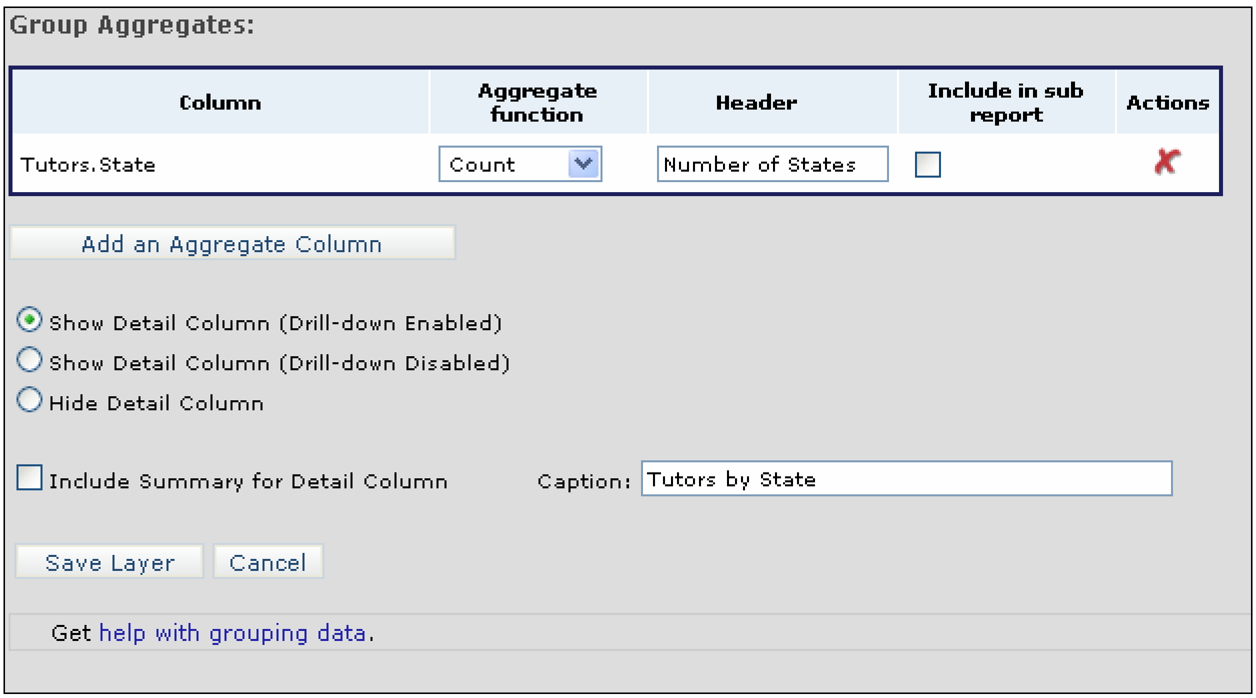
- **Show Detail Column (Drill-down Enabled)**
- **Show Detail Column (Drill-down Disabled)**
- **Hide Detail Column**

Aggregate Columns

Users can create group **aggregate columns** for Flat-Table or Drill-Down style reports. Users must first select one of the columns included in the report and the aggregate function to perform on that column. Since group aggregates are designed to summarize data from other columns, any column used for an aggregation is excluded from the sub-report. Users must specify to include those columns in the main report.

Group aggregates for flat-table style reports appear in a summary row for each grouping. Since the aggregated value appears as a footer, a descriptive label can be entered to help other users discern aggregate values when viewing reports.

Adding a Group Aggregate



NOTE: Columns included in the sub-report are never aggregated.

Aggregate Functions

Aggregate functions for text values are:

- Count
- Maximum
- Minimum

Aggregate functions for numeric values are:

- Sum
- Average
- Standard Deviation
- Minimum
- Maximum
- Count

Aggregate functions for date values are:

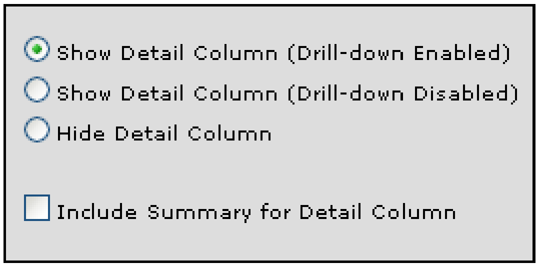
- Maximum (chooses the latest date)
- Minimum (chooses the earliest date)

To Create a Group Aggregate

1. Click Grouping.
2. Select a Grouping Option.
3. Click Add Grouping Layer.
4. Select an available column and click the  button to move the column into the Grouped Column list.
5. Click **Add an Aggregate Column**.
6. Choose a column from the drop-down menu.
    - The aggregate function is performed on the records from this column.
7. Select an aggregate function from the drop-down menu.
    - Some choices will not available, depending on the type of column you select.
8. Save the new group aggregate.

NOTE: If you selected drill-down style grouping, place a ✓ in the Include in sub-report checkbox to include that column in the sub-report. If you selected flat-table style grouping, type a descriptive name for the aggregate value in the Label field. If drill-down style was selected, give the aggregate column a name using the Header field.

Detail Options



LiteracyPro Reporting supports an unlimited number of grouping layers for any single report. Each layer can have multiple grouped columns, including any number of group aggregates.

Modify any grouping layer by clicking for the corresponding layer. Only the group aggregates can be modified for layers higher than the current layer. Click to remove a layer. The first row displays information about the top-most grouping layer.

Actions to modify or delete a grouping layer

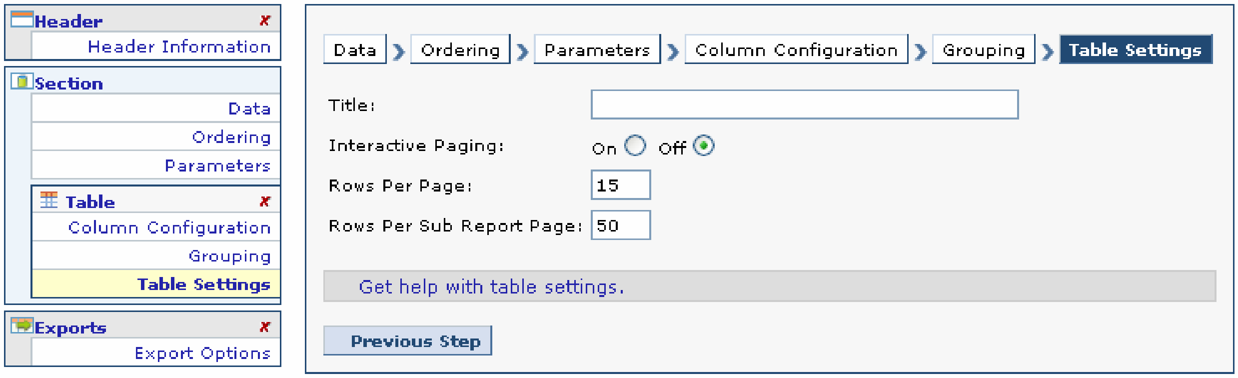
NOTE: The top-most layer cannot be deleted until all other existing layers are removed.

Table Settings

Table Settings allows you to give the table a title and add paging controls for large result sets. You can add interactive paging controls for the entire table as well as individual sub-reports in a drill-down style grouped table.

The number of rows displayed on each page and the number of rows per sub-report page is determined by the value set in Table Setting. To change, enter a value in either of these fields.

Table Settings



CHAPTER 5 - CROSSTABS

CROSSTABS

Cross tabulation style reports give users the ability to display joint distributions of data from three separate columns. The results of the cross tabulation are displayed in table format. Every crosstab table consists of three columns:

- Header Column (Crosstab)
- Label Column
- Value Column

The crosstab (header column) values populate the first row of the table. Each new value encountered in the crosstab column produces a new column in the crosstab table.

Values from the label column populate the first column of the crosstab table. The remainder of the crosstab table is populated by aggregations of data from the specified value column. The aggregate values are a *sum*, *count*, *standard deviation* or *average* of the fields in the data column.

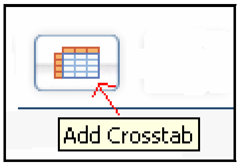
Users can also include crosstab summary data by adding an optional summary row or summary column.

Building a crosstab table is a 2 step process:

- **Crosstab Configuration** – select and configure the table's columns
- **Crosstab Settings** – configure table settings such as interactive paging

NOTE: The Crosstab Settings step is optional.

Crosstab icon



Specify the **header column** for the crosstab table by choosing a data column from the drop-down menu provided. Values from the header column populate the first row of the cross-tab table, and a new column is created for each unique value found.

Specify the **label column** by choosing a data column from the drop-down menu provided. Values from the label column populate the first column of the crosstab table.

Specify the **value column** and **aggregate function** by choosing a data column and function from the drop-own menus provided. Values from the data column are aggregated based on the function selected and populate the remainder of the crosstab table.

The aggregate functions available are:

- Sum
- Average
- Standard Deviation
- Count

Users can include an optional summary row at the bottom of the crosstab table. The summary row contains an aggregate value for each crosstab header column in the table. Give the summary row a caption and then choose an aggregate function from the drop-down menu.

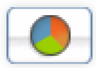
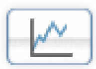
Include an optional summary column to create aggregations column-wise instead of row-wise. One aggregate value is computed for each unique value in the label column. The summary column is always the last column in the crosstab table, rendered from left to right after each crosstab header column. Give the summary column a header and then choose an aggregate function from the drop-down menu.

TIP: Crosstab tables can become quite long if there are a large number of distinct values in the crosstab column. Set parameters on your data to limit the number of distinct values.

CHAPTER 6 - CHARTS

CHARTS

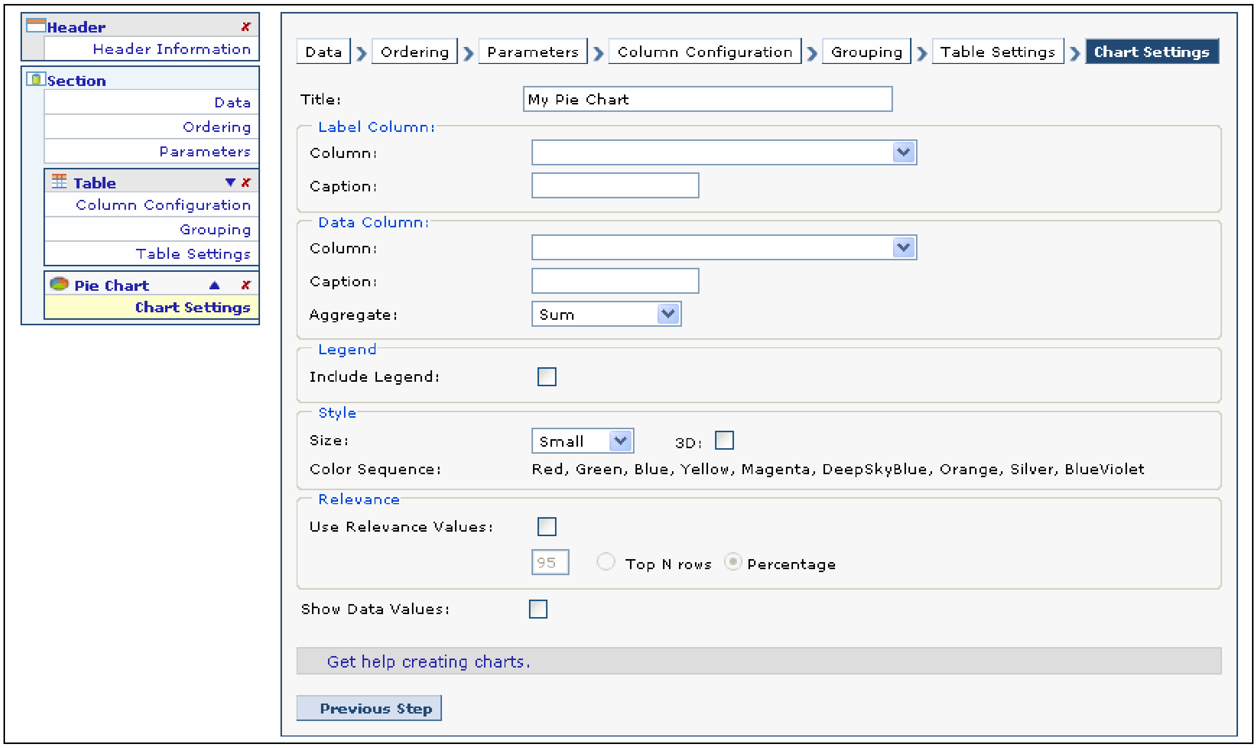
The Report Builder charting components allow you to build various types of charts to bolster your report. Charts provide a visual representation of data utilizing different styles and types. The following chart types are supported in **LiteracyPro Reporting**:

- Pie 
- Bar 
- Line/Area/Spline 
- Scatter 

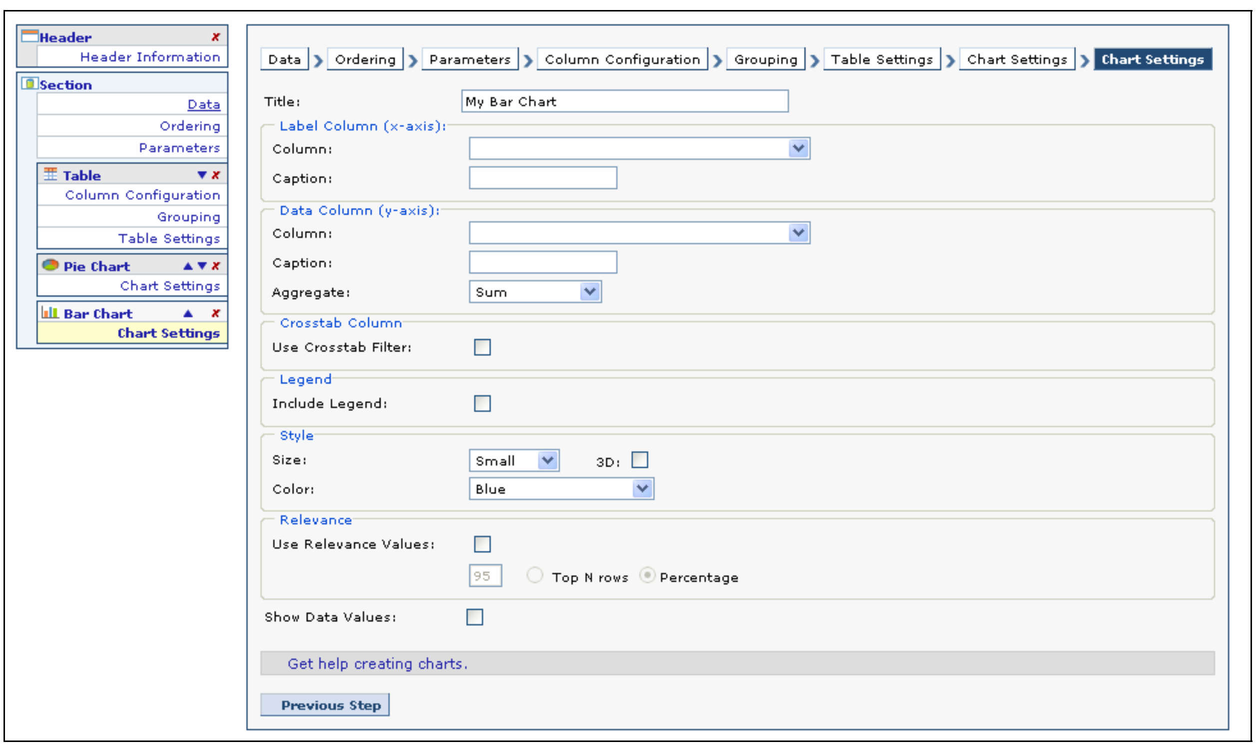
Creating a Chart

1. Click the appropriate chart icon.
2. Add a title for the chart.
3. From the drop-down list of available columns, select the column that the data will be based on.
4. Save report.

Pie Chart Settings



Bar Chart Settings

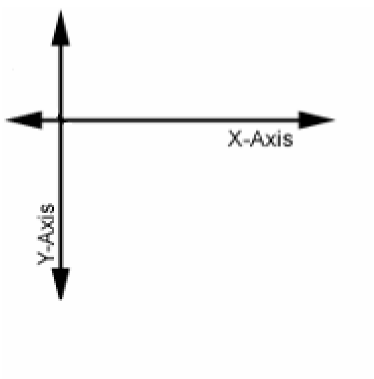


Select a column to represent the x-axis (the label column). Give the x-axis a name by typing a label in the Caption field.

Select a column to represent the y-axis (the data column). Give the y-axis a name by typing a label in the Caption field. If you are working with the Pie, Bar and Line Chart components, select an aggregate from the drop-down menu. The following data column aggregates are available:

- Sum
- Average
- Count
- Maximum
- Minimum

NOTE: The y-axis (data column) must be a numeric value. The x-axis (label column) can be any data type.



If you are working with the Bar or Line Chart components, you have the option of adding a crosstab filter to the chart. Select the crosstab column and then choose a data view type from the drop-down menu.

Relevance Values

If you are working with the Pie Chart component, place a ✓ in the Use Relevance Values checkbox to specify thresholds for data displayed in the chart. Enter a relevance value in the value field and select **Top N Rows** or **Percentage** as the scale.

For example, only the top 75% of data in the chart could be relevant. In this case, check the Use Relevance Values checkbox, enter a value of **75** in the value field, and click the Percentage radio button.

Alternately, only the top 5 rows of data in the chart could be relevant. In this case, check the Use Relevance Values checkbox, enter a value of **5** in the value field and click the Top N Rows radio button (*N* is a variable referring to the input value).

If you are working with the Pie or Scatter Chart components, you can display the actual numeric data on the chart by clicking **Show Data Values**.

CHAPTER 7 – STYLE AND FORMATTING

ADDING FORMATS AND STYLES TO THE REPORT

LiteracyPro Reporting allows you to add a header, create custom labels and configure the overall look and feel of your reports. You can also configure the page size and orientation for printing directly from the browser.

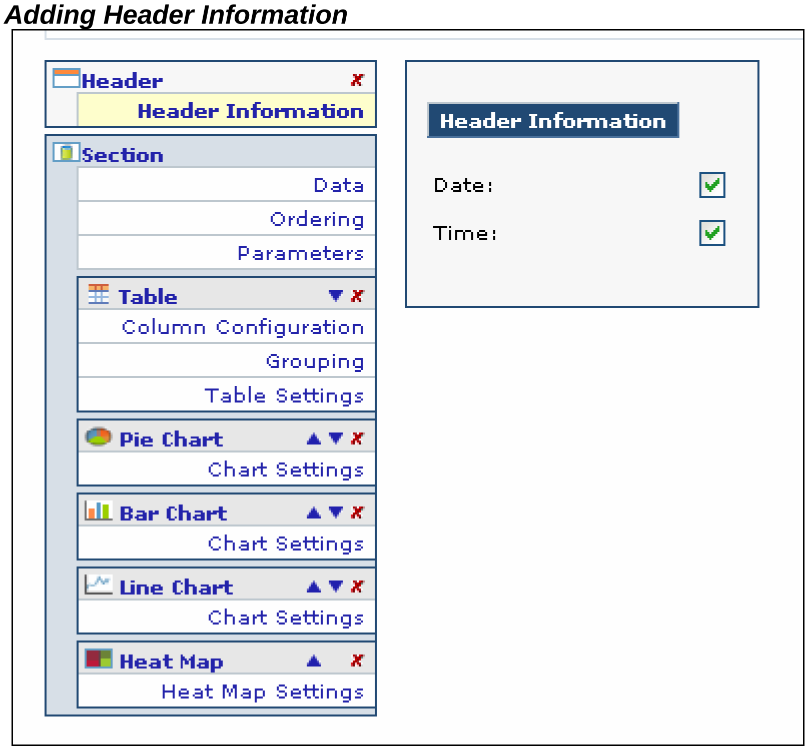
Adding a Header to the Report

1. Click Header Information to add the Header component.

2. Place a ✓ in the Date and Time checkboxes to include the current date and time in the header.

- Uncheck if you do not wish to have the date and time displayed in the report.

Adding Header Information



Adding Labels

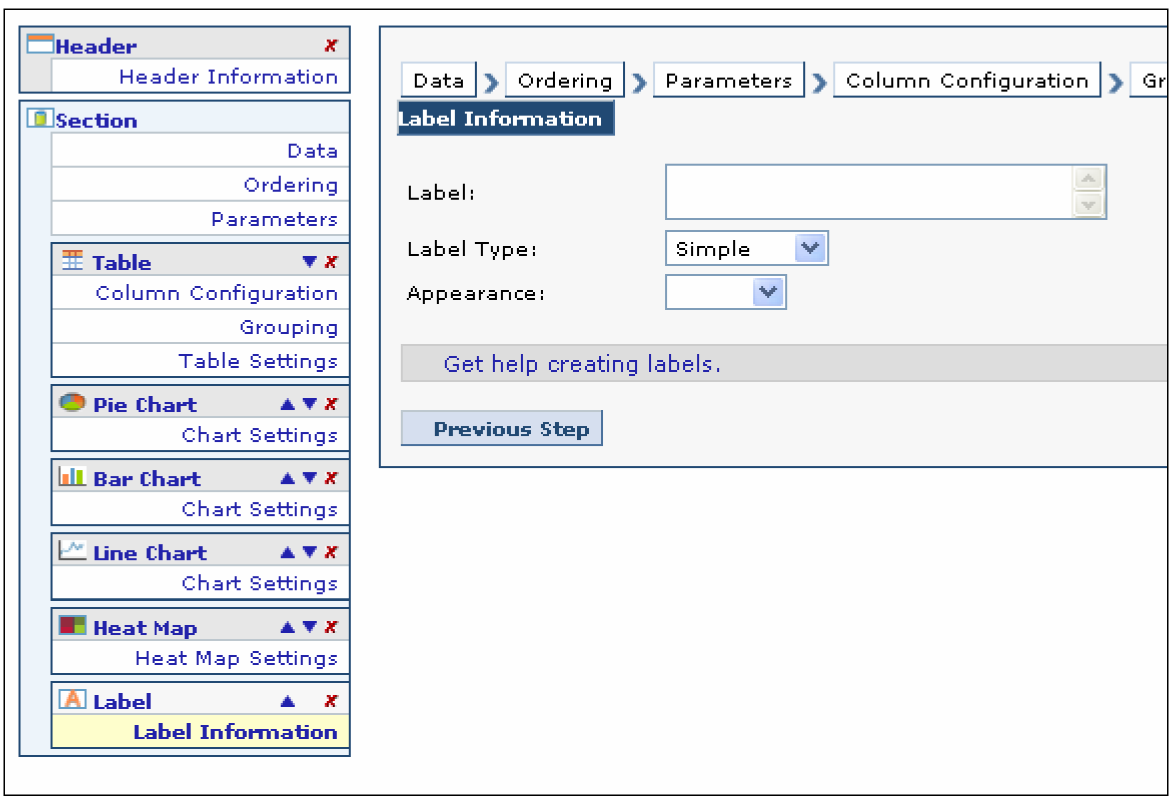
The **Label** component gives you the ability to add custom messages and text in your report. You can add an unlimited number of labels above or below other reporting components. Use labels to add text to your report that would otherwise be too long for a table or chart caption.

To add a label

1. Click the Label icon .
2. Type the text for the label in the label field.
2. Choose a label type.
    - Simple
    - Full Width
3. Choose a style from the Appearance drop-down menu.
    - Bold
    - Green
    - Red
    - Yellow

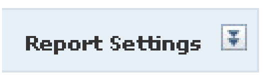
TIP: Labels are centered in the web browser by default. If you want your label left-aligned with the browser window, choose the Full Width lable type.

Adding Label Information



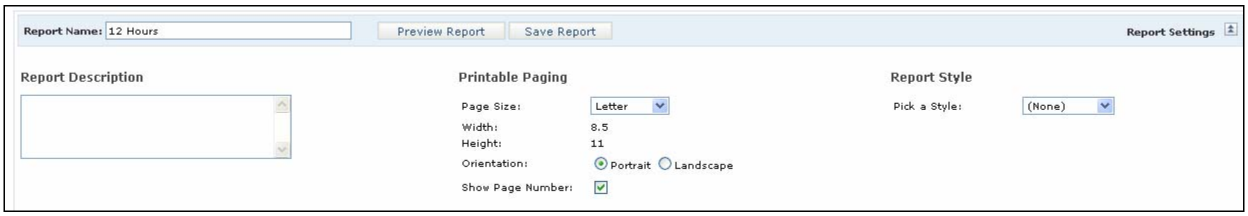
Report Settings

You can configure global report settings by clicking the down arrows by Report Settings at the top right of the screen.



Report Setting allows you to give your report a detailed description, configure printable paging options and choose a template for the overall "look and feel" of the report.

Reports Settings



Report Description

A description of the report is optional. The description appears in the list of reports under the My Reports and Shared Reports areas. Entering a description makes report viewing and management easier.

Report with Description in My Reports

Printable Paging

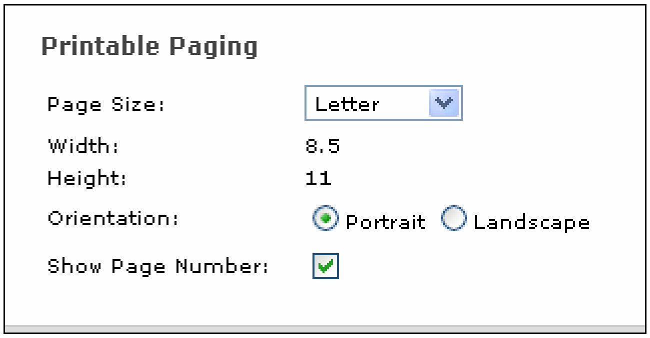
Printable Paging specifies formatting for the printed report.

Page Size

- **Letter**
- **Legal**
- **Executive**
- **A4**
- **A5**

Select **Portrait** or **Landscape** orientation by selecting the appropriate radio buttons. Number each page of the report by placing a ✓ in the Show Page Number checkbox.

Printable Paging

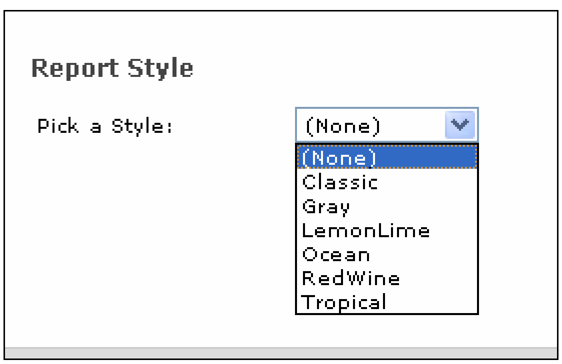


Report Styles

The Report Style gives your report a specific "look and feel". The report styles available are:

- (none)
- Classic
- Gray
- LemonLime
- Ocean
- RedWine
- Tropical

Report Styles



Chapter 8 – Export Options

Exporting to Other Formats

The **Export Options** component allows you to add links to the bottom of your report that give users the ability to publish reports. These options allow you to:

- Print the report from a browser
- Export the report to popular formats such as Word, Excel and PDF
- Add reports to the archive for other users to view.

The following export options are available:

- Searchable Report
- Printable Paging
- Export to Excel
- Export to Word
- Export to PDF
- Export to CSV
- Export to XML
- Send PDF Report by Email

NOTE: *Microsoft Office* is integrated with *Internet Explorer*. Exporting the reports in an Office format opens a new browser window to edit and save the report. *Microsoft Office* is required to edit the reports from a browser window.

Export Options

- **Searchable Report**

  Searchable Report presents the report in a single-page view. The **CTRL-F** shortcut is then available to search the entire report overlooking pagination. Searchable Report opens a new browser window, displaying the entire report on one page.

  Press **CTRL-F** to open the **Find** window in most of the popular Internet browsers. Type the name of the record to search for and click **Find Next** to jump to the first occurrence of that record. The main difference between the **Searchable Report** view and the **Printable Paging** view is how the webpage is configured for printing. Printing a report from the Searchable Report view prints the entire report as one page, cutting off any graphics or records as the report prints. Use Printable Paging to print reports properly in **LiteracyPro Reporting**.

- **Printable Paging**

  Printable Paging presents the report in a view that is suitable to print. Printable Paging opens a new browser window, displaying an expanded view of the report with details for each row. The report is formatted for printing, avoiding the "cutoff" scenario that commonly occurs when printing web pages.

  The progress of the page formatting will display in the lower left corner of the browser window. It may take a few seconds to format a large report for printable paging. Click the print icon from your web browser to print the report.

- **Export to Excel**

  Export to Excel saves the report in Microsoft Excel format. If Microsoft Excel is installed, the report can be edited as an Excel spreadsheet from the browser window. Export to Excel opens a new browser window, displaying the report in Microsoft Excel (spreadsheet) format. The URL displays a path with an Excel (.xls) extension. If Microsoft Excel is installed, the report opens as an Excel spreadsheet. Select rows or columns for sorting, copying, pasting, etc., and perform many other typical Excel functions.

  Save the report in Excel format by clicking the File menu and choosing **Save as**. Choose a name and location for the file and click **Save**.

- **Export to Word**

  Export to Word saves the report in Microsoft Word format. If Microsoft Word is installed, the report can be edited as a Word document from the browser window. Export to Word downloads the report into a Microsoft Word document. A temporary name is given to the file, with the Word file extension (.doc). If Microsoft Word is installed, the report opens as a Word document. Edit the report as a Word document or save the report unedited.

- **Export to PDF**

  Export to PDF saves the report as a PDF (Portable Document Format), which can be viewed with Adobe Reader and edited with Adobe Acrobat. Export to PDF opens the report in the current browser window as a PDF document viewable with Adobe Reader.

  The Adobe toolbar is displayed across the top of the report, providing many typical PDF functions. Users can save, print and search the entire document. Save the report in PDF format by clicking **Save a copy** from the Adobe toolbar. Choose the name and location and click **Save**. The default file type is **Adobe PDF Files (*.pdf)**.

  In order to view PDF reports from the browser, the Adobe Acrobat Reader plug-in **must** be installed. See your systems administrator for additional help.

- **Export to CSV**

  Export to CSV saves the report to a comma-delimited format. The file can be viewed with Microsoft Excel. Export to CSV opens a new browser window and displays the report in comma separated values within a spreadsheet (comma-delimited text file).

  Save the report in CSV format by clicking the File menu and choosing **Save as**. Choose the filename and location and click **Save**. The default file type is **CSV** (comma delimited).

- **Export to XML**

  Export to XML saves the report data in XML format. The XML dataset is viewable from Internet Explorer. Export to XML opens a new browser window and displays all the data presented in the report in XML (Extensible Markup Language) format.

  Save the report data in XML format by clicking the File menu and choosing **Save as**. Choose the filename and location, and then choose **XML Files** from the drop-down menu. Click **Save** to create the XML file.

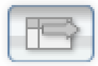
  The Export to XML feature is disabled by default. If you require this feature, contact your system administrator to enable it.

- **Send PDF Report by Email**

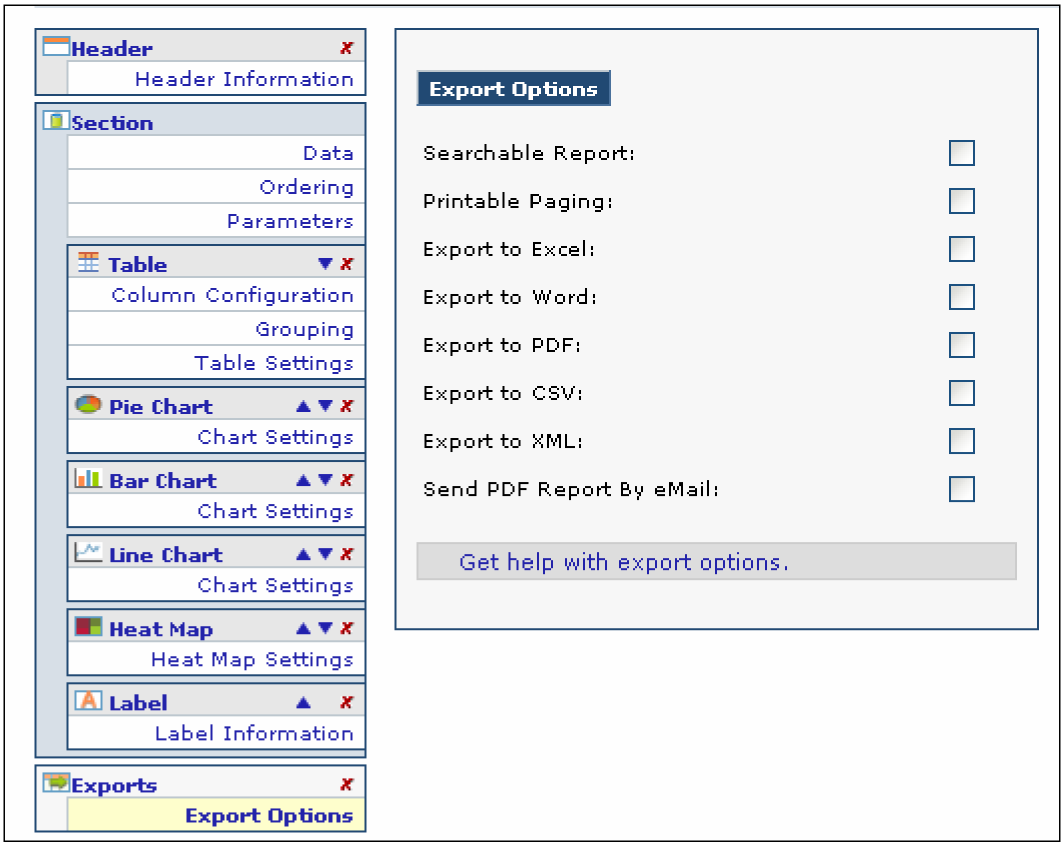
  Send PDF Report by Email opens a form where you can compose the email and choose the recipients. All fields except for CC and BCC are required. Click Send to send the email with a PDF version of the report attached. Click Cancel to cancel the export action.

TIP: When saving, make sure the file type is correct. Choose the appropriate extension from the Save As Type drop-down menu if the correct file extension does not display.

Adding an Export to a Report

1. Click the Add Export icon. 
2. Place a ✓ in front of each export format to appear in the report.
3. Save report.

Adding an Export Option



To Edit Export Options

1. Click the Exports link and edit export choices.
2. Save report.

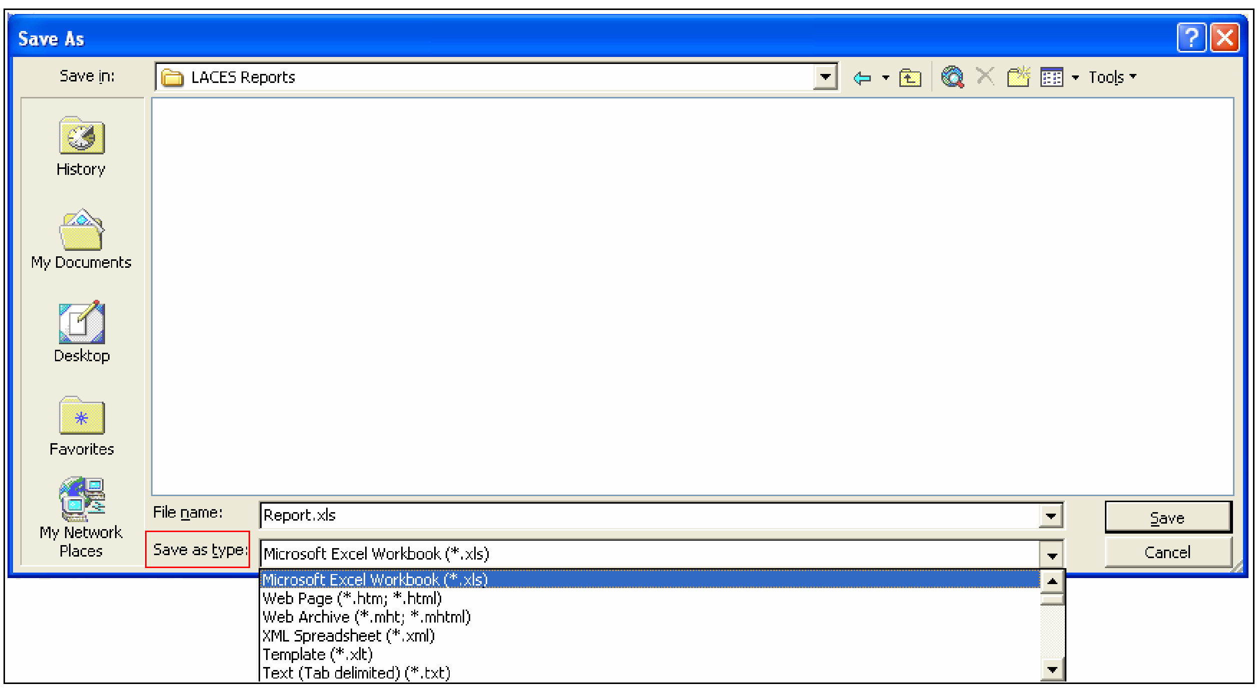
Opening a Report in an Export Format

1. Run the report by clicking the report name link in My Reports.

2. At the bottom of the report, click the shortcut icon for the export format you wish to use. This will open a new browser window. The extension for the selected format will display at the end of the filename in the Address box at the top of the screen.

.doc	Word
.xls	Excel
.pdf	Adobe PDF
.xml	XML format

3. Save the report in the selected format, if necessary.
   - Click File.
   - Click Save As.
   - Make sure the correct file type is displayed.
   - Enter a new file name if desired.
   - Click Save.



Chapter 9 – Running Reports

How to Run a Report

Running Reports

A list of reports is available under **My Reports**. If no reports have been created, this list is empty.

Click the name of the report to launch it in a new browser window.

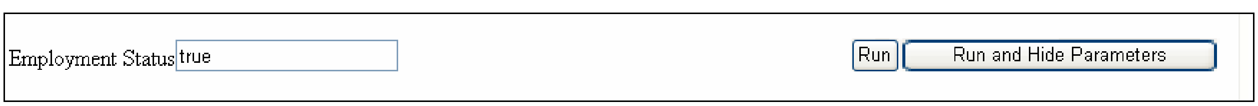
There are two additional options for running the report if a ✓ was placed in the Ask checkbox when defining parameters (*Chapter 2*).

- **Run and Hide Parameters** - Run the report and hide parameter input box
- **Run** - Run the report and leave parameter input box visible

Run Options when Ask is Selected

If the report contains numerous parameters, click **Run and Hide Parameters** to provide more screen space for the report. Run the report again to input additional parameters.

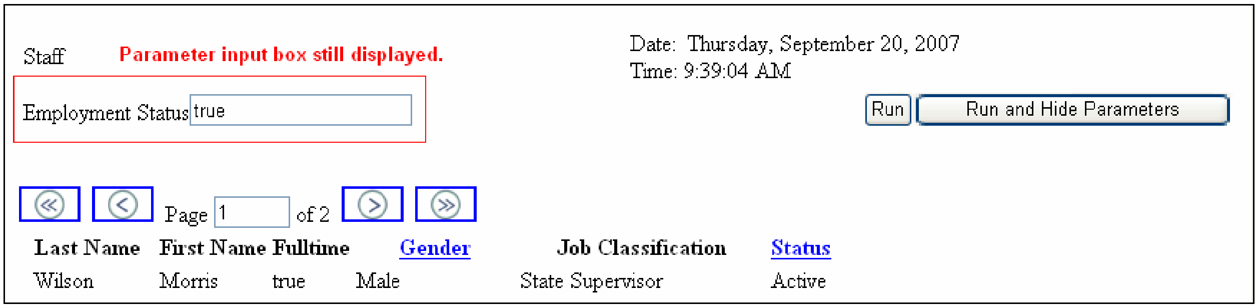
Run and **Run and Hide Parameters** affect the parameters for the report. Any additional settings specified in the Report Builder are left intact.



For example, in a Staff report, a parameter is set to display full-time employment status. The Ask checkbox has been checked in the parameter. When the report is selected from the Reports list, the option to Run or Run and Hide Parameters will display at the top of the report.

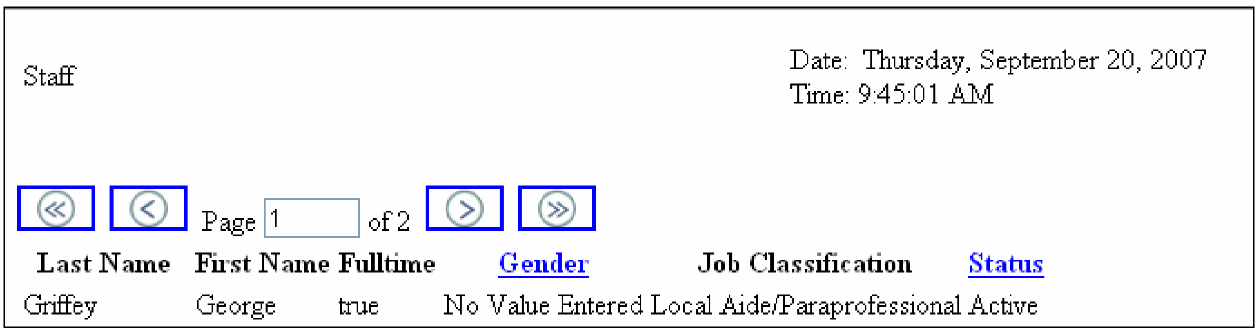
Clicking **Run** will run the report with the parameter applied. The parameter input box will still display.

Parameter input box still visible



Clicking Run and Hide Parameters will run the report based on the parameter, but the parameter input box will not be visible.

Same Report with parameter input box hidden



CHAPTER 10 – MANAGING REPORTS

MANAGING REPORTS CREATED WITH LITERACYPRO REPORTING

As reports are created in **LiteracyPro Reporting**, it is important to organize and manage the reports. **LiteracyPro Reporting** provides the following actions:

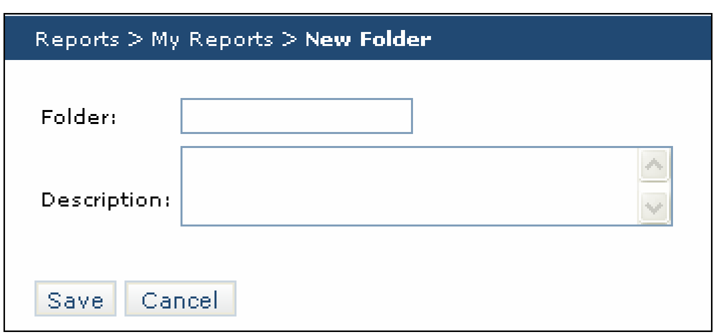
- Add a New Report
- Add a New Folder
- Delete Reports/Folders
- Copy Reports
- Move Reports

To create a new folder to store reports:

1. Click **Add a New Folder** to create a new folder within the Root Folder.

2. Type the name of the new folder into the Folder field, and type an optional description into the Description textbox.
3. Click **Save** to create the new folder.

Adding a New Folder



The new folder appears in the Root Folder, along with any user-generated reports. After creating a new report folder, you can move reports out of the Root Folder into the new folder to make the workspace more manageable.

To delete a report folder:

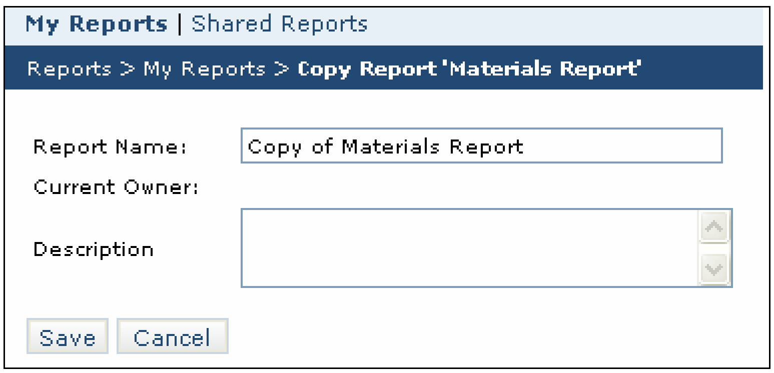
1. Place a ✓ in the checkbox next to the folder name.
2. Click Delete Reports/Folders to remove a folder and ***all reports stored within the folder***.
2. Click **OK** to remove the folder or click **Cancel**.

NOTE: Deleting a report folder removes ALL reports stored within that folder and removes the report from the list.

To copy a report:

1. Place a ✓ in the checkbox in front of the report to be copied.
2. Enter a new name for the copied report, or leave the default name.
3. Click Save.

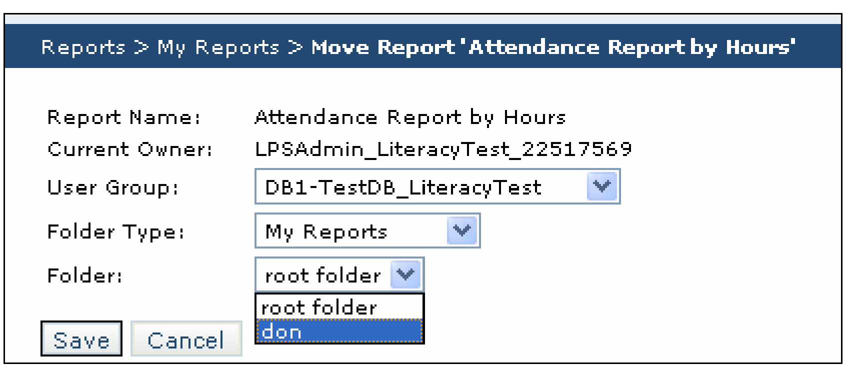
Copying a report



To move a report into a folder:

1. Place a ✓ in the checkbox in front of the report to be moved.
2. Choose a folder from the Folder drop-down menu. The **root** folder is the default location for all reports.
3. Click **Save** to move the report.

Moving a Report to a New Folder



CREATING REPORTS

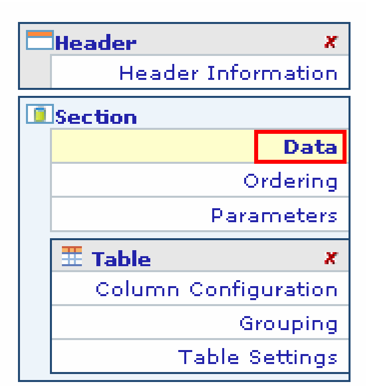
Tutorial 1 - Volunteer Contact Information for Active Volunteers

This report displays Volunteer Contact Information for Active Volunteers.

Sample Report – Volunteer Contact Information

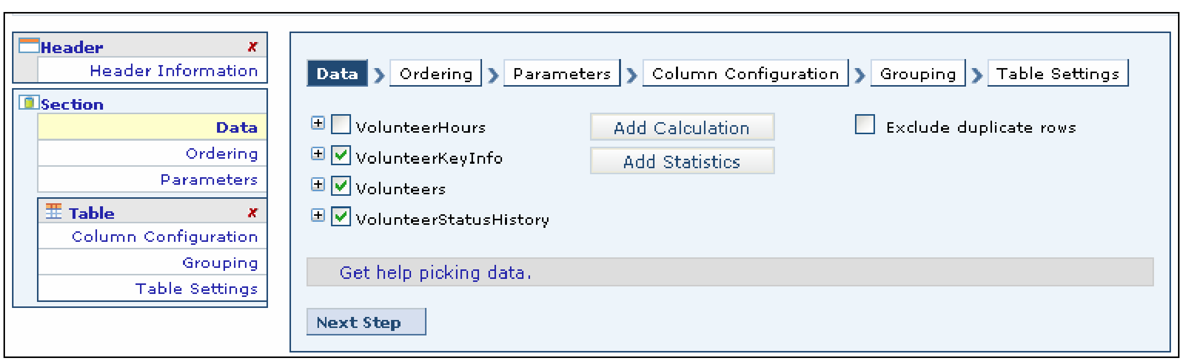
First Name	Last Name	Address1	City	State	Zip	Home Phone	E-Mail	Status	Intake Date
Rob	Allan								
		123 Madison Avenue	Boulder	CO	80302	3031112222	bob@yahoo.com	Active	9/1/2007
Shirley	Banks								
		345 Main Avenue	Boulder	CO	80302	3032126795	Shirley@aol.com	Active	9/12/2007

1. Click Reports from the User tab.
2. Click Add New Report.
3. At the Section Panel, click Data. This will display a list of the available data objects.



The report will be based on Volunteers. Place a ✓ in the checkbox in front of the data object "Volunteers." This will display the next set of data objects that have a relationship with "Volunteers."

Related Volunteer Data Objects selected

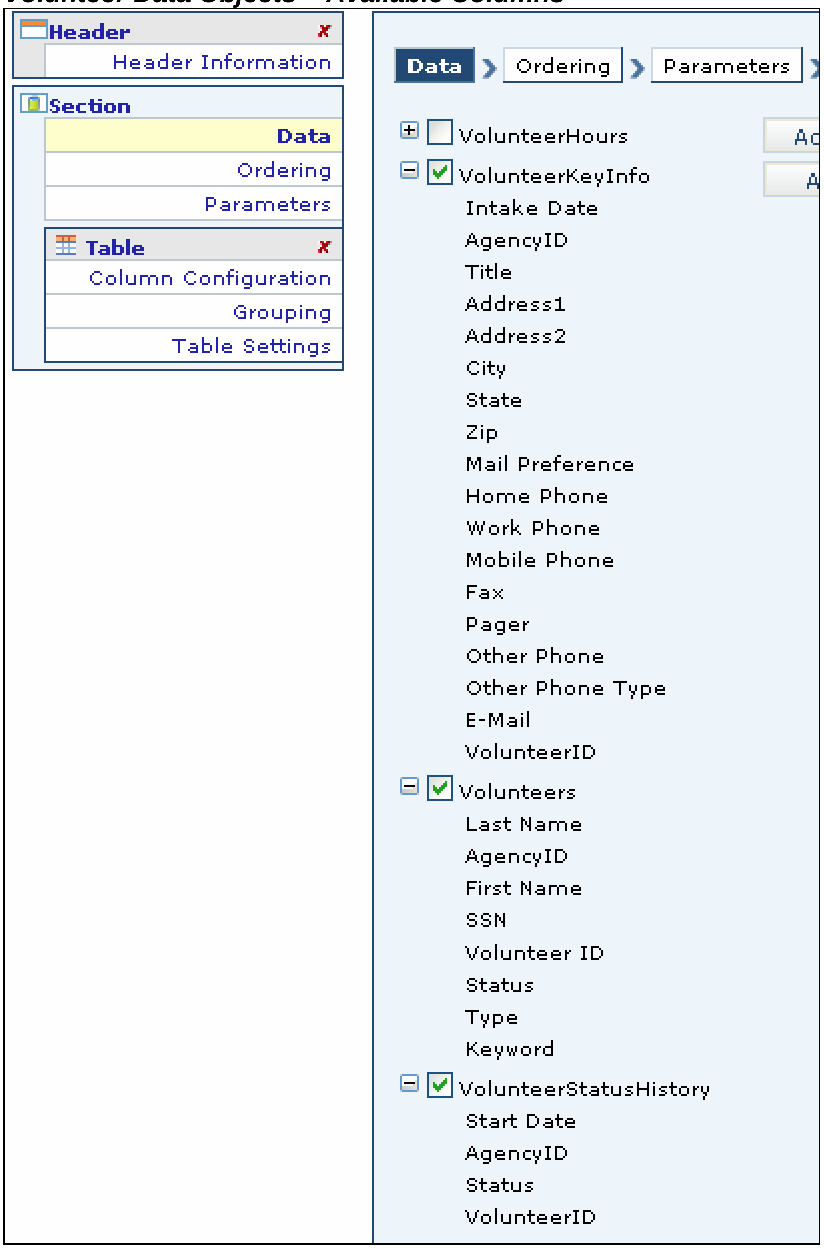


4. Place a ✓ in front of the additional data objects to be included in the report.

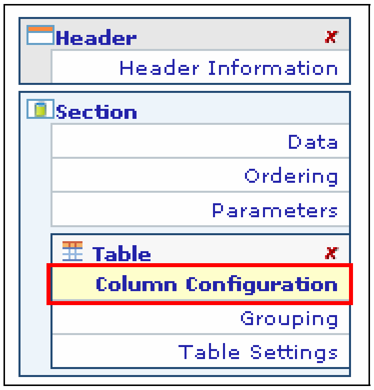
Last Name and *First name* are included in the data object Volunteers. Other contact information is found in the VolunteerKeyInfo data object. *Status* is found in the VolunteerStatusHistory data object.

To display the available columns, click the + in front of the data object.

Volunteer Data Objects – Available Columns

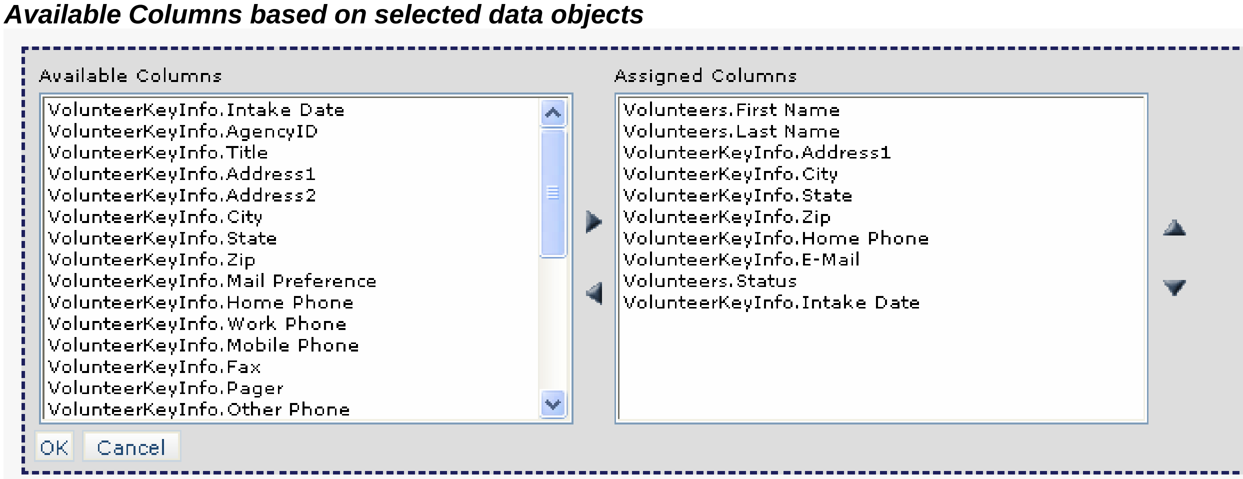


5. Click Column Configuration under Table from the Section Panel.



6. Click the Add Columns button to display a list of available columns.

Available Columns based on selected data objects

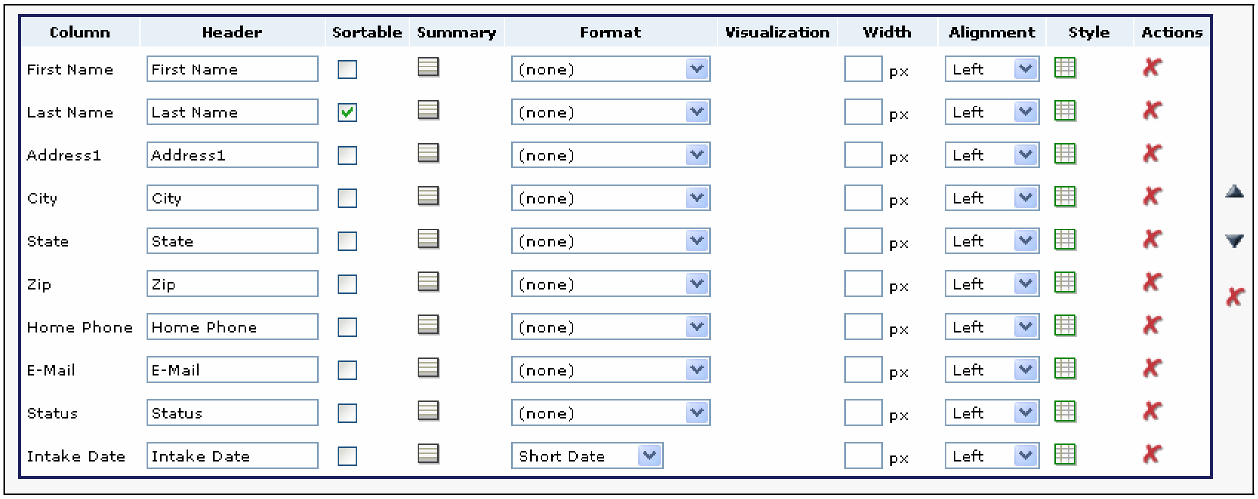


7. Select the columns to be included in the report, then click the right arrow to move to the Assigned Columns frame. For this report, select the columns listed above. Click OK.

NOTE: To move multiple columns, hold the Control key and select the columns you want in the report, and then click the right arrow , or double-click an available column to move it to the Assigned Columns frame. Double-click a column in the Assigned Columns frame to remove, or select the column and click the left arrow .

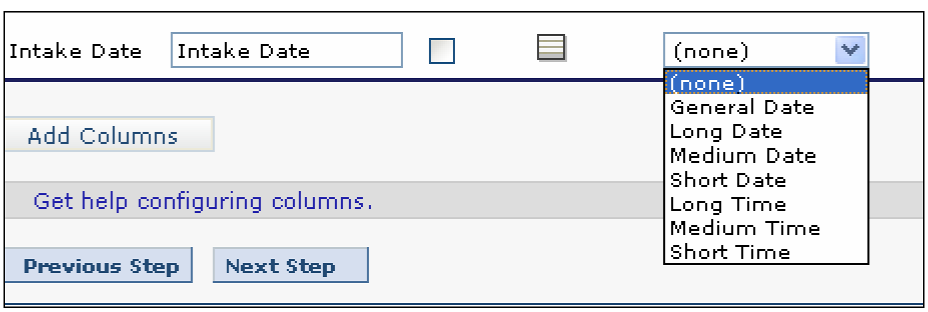
TIP: **To move to the next or previous item listed on the Section panel, click Previous Step or Next Step.**

8. At the Column Configuration display, columns can be moved up or down to change the display order.



Column	Header	Sortable	Summary	Format	Visualization	Width	Alignment	Style	Actions
First Name	First Name			(none)		px	Left		
Last Name	Last Name	✓		(none)		px	Left		
Address1	Address1			(none)		px	Left		
City	City			(none)		px	Left		
State	State			(none)		px	Left		
Zip	Zip			(none)		px	Left		
Home Phone	Home Phone			(none)		px	Left		
E-Mail	E-Mail			(none)		px	Left		
Status	Status			(none)		px	Left		
Intake Date	Intake Date			Short Date		px	Left		

9. Change the Intake Date format by clicking the down arrow under format and select Short Date. Make the Last Name column sortable by placing a ✓ in checkbox.



10. Click the down arrow at Report Settings. Apply the Ocean format.

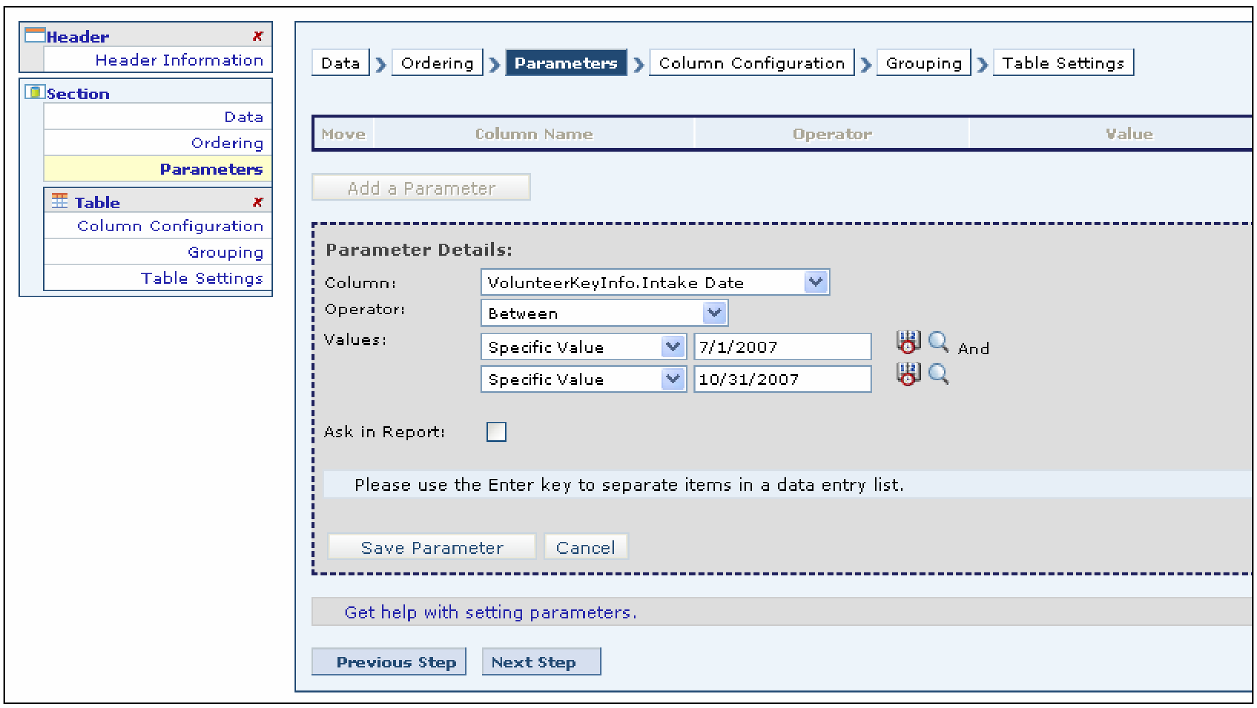
11. Name the report Volunteer Contact Information and save.

12. Run the report.

Tutorial 2 - Volunteer Contact Information for Active Volunteers with Intake Date Parameter

This report displays Volunteer Contact Information for Active Volunteers whose Intake Date was between 97/1/2007 and 10/31/2007.

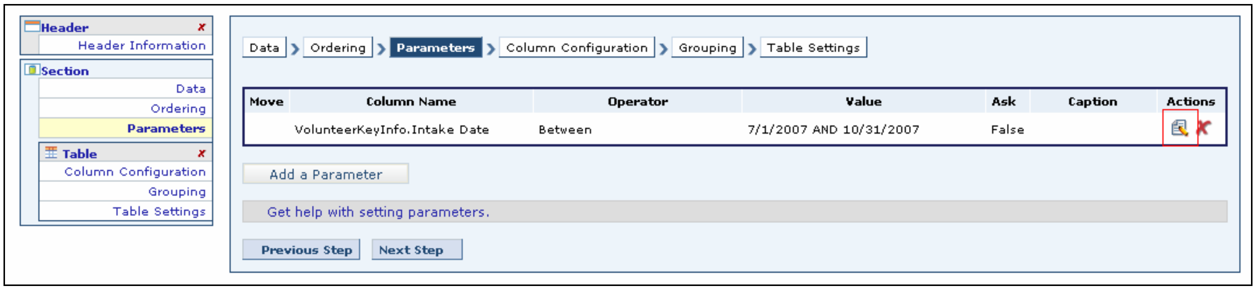
1. Modify the report Volunteer Contact Information by placing a ✓ in front of the report name and clicking the Modify Report icon.
2. Click Parameters in the Selection Panel.
3. Click the Add a Parameter button/
4. Select the VolunteerKeyInfo.Intake Date column.
5. Select Between for the Operator.
6. Enter the dates 7/1/2007 and 10/31/2007.
7. Save Parameter.
8. Save report and run.



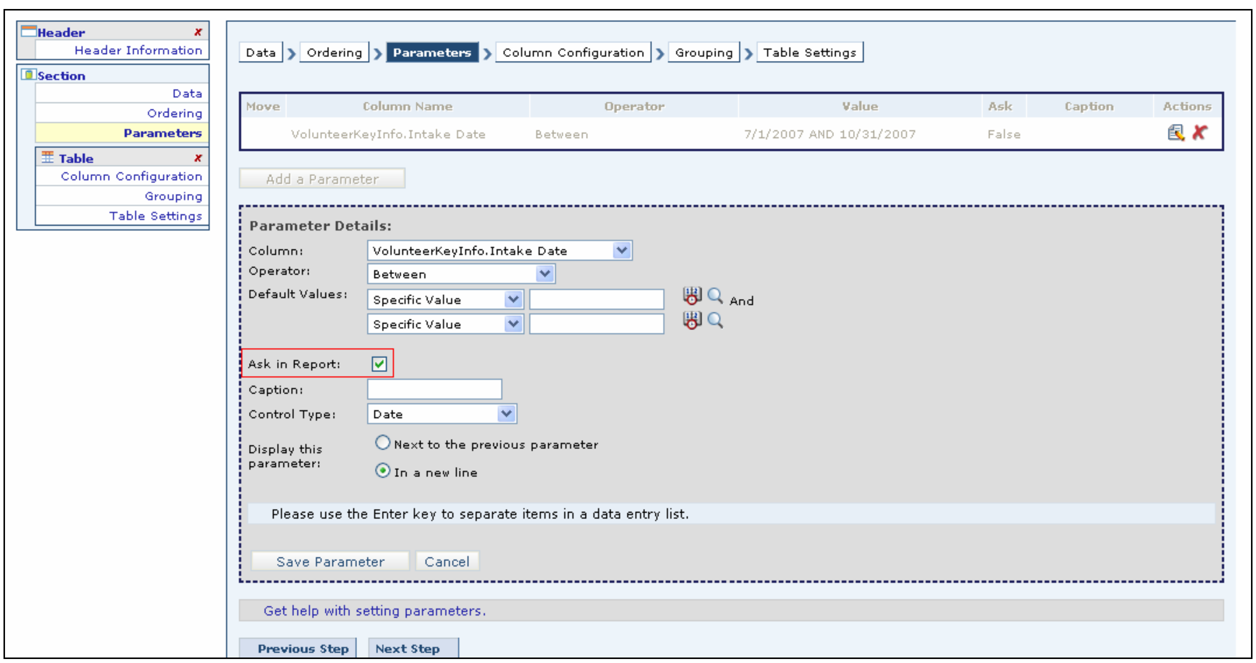
Tutorial 3 - Volunteer Contact Information for Active Volunteers with Intake Date Parameter set to Ask

This report allows you to ask for a specific intake date before running the report.

1. Modify the report Volunteer Contact Information by placing a ✓ in front of the report name and clicking the Modify Report icon.
2. Click Parameters.
3. Select the Edit icon.

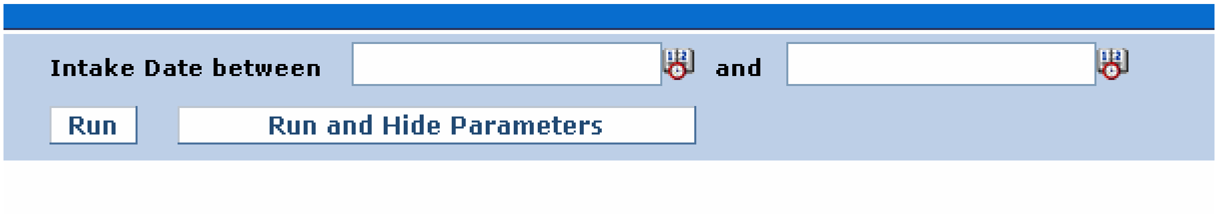


4. Remove the dates and place a ✓ in the Ask checkbox.
5. Leave the default to appear in a new line.
6. Click Save Parameter.



7. Save the report and run.

8. Enter Intake Dates and click Run. (You must enter as mm/dd/yyyy).



9. Enter different Intake Dates and click Run and Hide Parameters.

Tutorial 4- Student Attendance Report by Specific Dates with Hours Totaled (Grouped Flat-Table)

Sample Report – Student Attendance

Last Name	First Name	Date	Class	Hours
Adams	John			
		10/26/2006	Demo Group	0
		10/30/2006	Demo Group	6
		10/27/2006	Demo Group	5
		11/2/2006	Demo Group	7
		11/6/2006	Demo Group	8
		10/24/2006	Demo Group	0
		10/25/2006	Demo Group	3
				Student Hours 29
Adams	Mary			
		10/25/2006	Demo Group	3
		10/26/2006	Demo Group	1
		10/30/2006	Demo Group	6
		10/27/2006	Demo Group	5
		11/2/2006	Demo Group	7
		11/6/2006	Demo Group	8
		10/24/2006	Demo Group	0
				Student Hours 30
Aguilar	Daniel			
		11/30/2003	ESL-Intermediate	2
		11/30/2003	ESL-Intermediate	2
		6/7/2004	ESL-Intermediate	5
				Student Hours 9

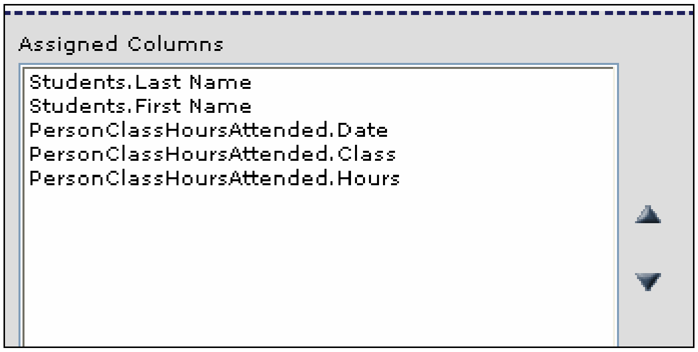
1. Click Add a New Report.

2. Select the data objects:

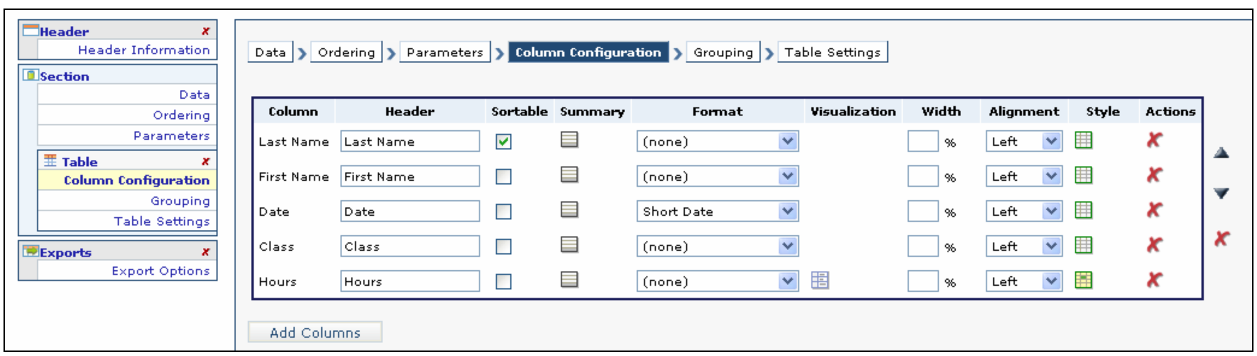
Students

PersonClassHoursAttended

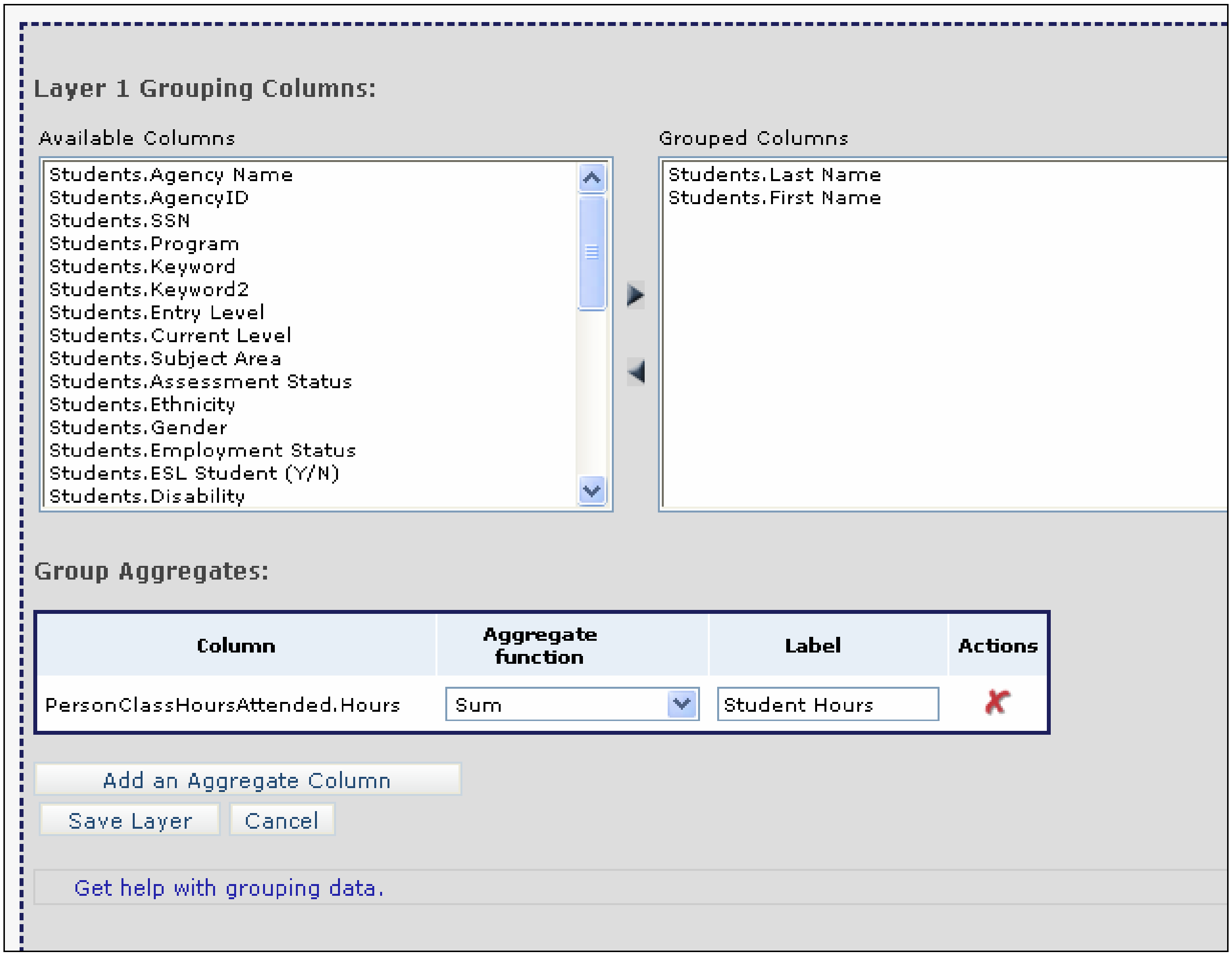
3. Click Column Configuration. Select the following columns and click OK.



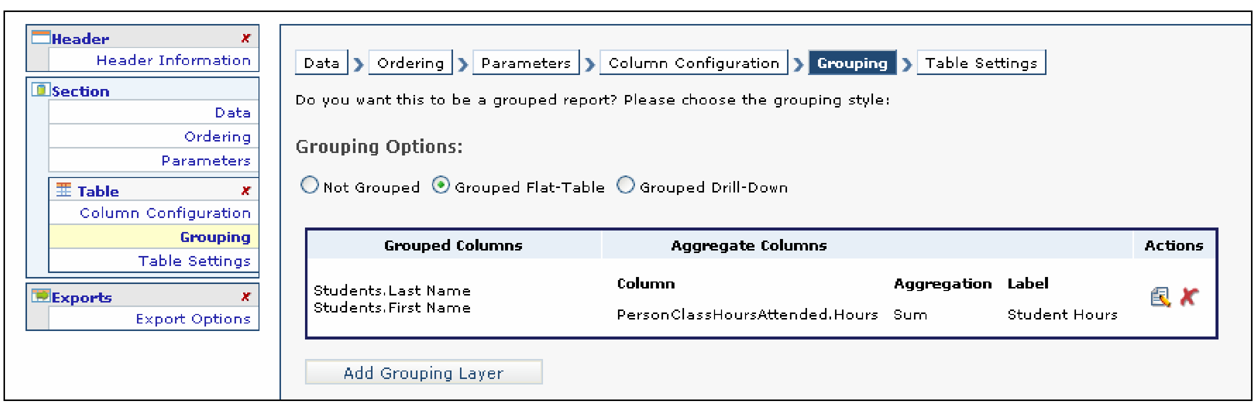
4. Place a ✓ in the sortable checkbox after Last Name.
5. Change the Date format to Short Date.



6. Select a report style.
7. Click the Grouping button. Select Grouped Flat-Table and click Add Grouping Layer.
8. Select Student Last Name and First Name and move to Grouped Columns.
9. Click Add an Aggregate Column.
10. Select PersonClassHoursAttended.Hours for the aggregate column.
11. Choose Sum for the aggregate function.
12. Add the label Student Hours.
13. Click Save Layer.



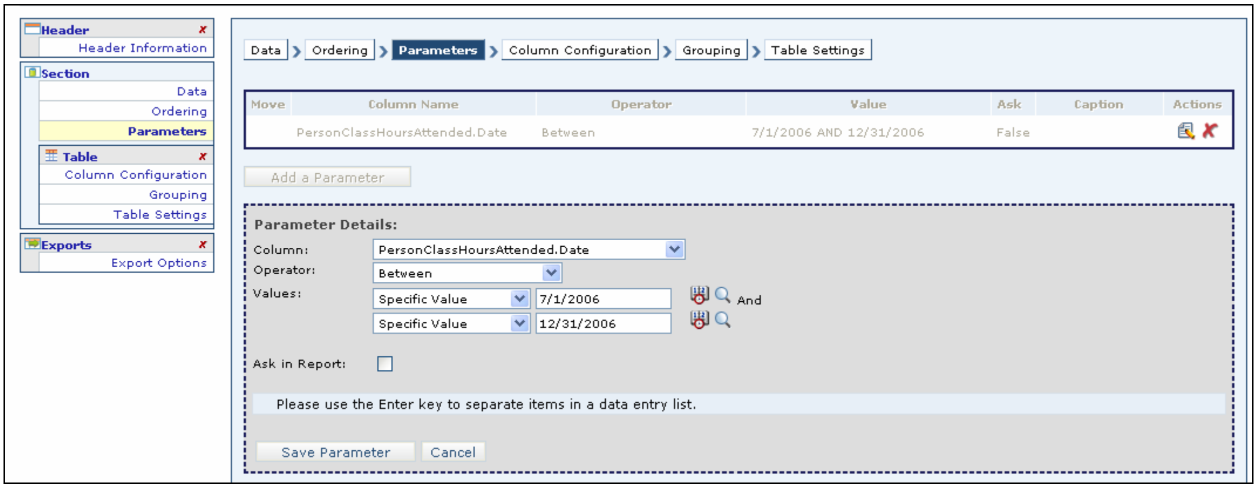
Grouping Options window



14. Click Parameters.

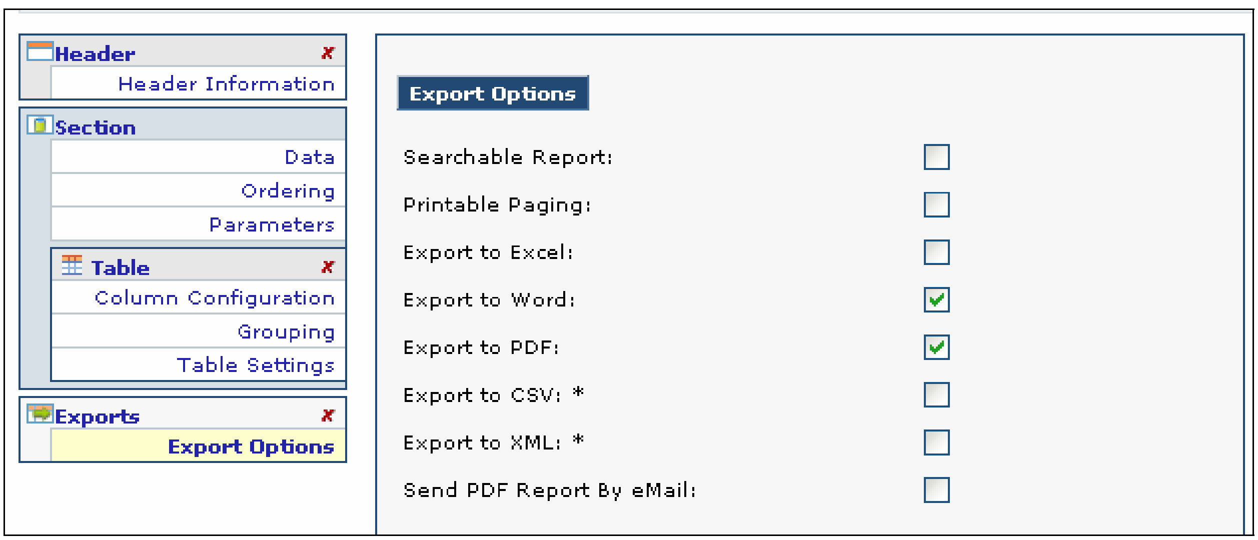
15. Click Add a Parameter.

16. Add the following parameter details. (In this example, the date parameter is set for dates between 7/1/2006 and 12/31/2006. Any date range can be added).



17. Click Save Parameter.

18. Click Exports and place a ✓ in the checkbox after Export to Word and Export to PDF.



19. Save and run report.

Add a condition:

1. Modify the report.
2. Click Column Configuration.

3. Click the Style icon to add a style to Hours.

4. Click Add a Condition.
5. Select the column PersonClassHoursAttended.Hours.
6. Select:

   Operator: Less than

   Value: 5

   Style: Red

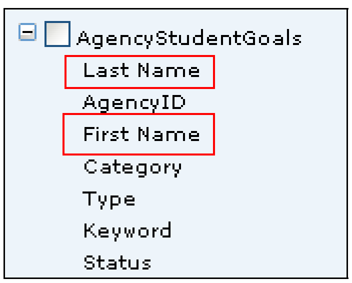
7. Click Save Style.
8. Save and run report.

APPENDIX A

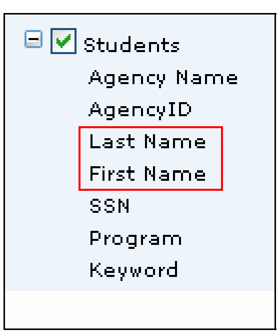
UNDERSTANDING DATA OBJECTS

A **data object** is equivalent to one table or view from the source database (in this case the source database is LACES. Data objects are usually given user-friendly names and descriptions to help users build reports. Data objects can be **related** to one another. When the user chooses a data object by placing a ✓ in the box next to it, any data objects that have a relationship with the initially selected data object will display. *(Refer to Page 13, Selecting Report Data).*

By clicking the + in front of a data object, you can expand it to view a list of available **data columns**. Some data objects may have the same available data columns. This allows the user to build a report without having to go to multiple locations to find the data columns they need. For example, the data object AgencyStudentGoals contains data columns for Last Name and First Name.



The data object for Students also contains data columns for Last Name and First Name. If the user is creating a report based on both of these data objects, and the report will contain the Last Name and First Name data columns, those columns only need to be added once.



Student Last Name and First Name are located in a specific table in the database. While these data columns may be included in more than one data object, the data is coming from the same source.

Data Objects and their Associated Data Columns

AgencyStudentGoals

Last Name
AgencyID
First Name
Category
Type
Keyword
Status
Date Set
Date Met
Description
Included in Survey
Responded to Survey
SSN
Keyword
Additional Details
Goal ID
PersonID

Checkout

Last Name
AgencyID
First Name
Status
Type
Start Date
Due Date
Return Date
Amt. Due
Material ID

ClassPersonDirectory

Last Name
AgencyID
First Name
Address 1
Address 2
City
State
Zip
Phone at Address
ClassSectionID

ClassPersonHoursAttended

Date
AgencyID
Last Name
First Name
Middle Name
Type
Hours Present
Hours Absent
Late

Date
ClassSectionID

ClassPersonRegistration

Last Name
AgencyID
First Name
Final Grade
Grade Points
QualityPoints
Earned Credit
Possible Credit
Class Start Date
Class End Date
Enroll Status
Hrs Earned
Student Start Date
Student End Date
ClassSectionID

ClassSectionComment

Date
AgencyID
Type
Comment
ClassSectionID

ClassSectionKeyInfo

Status
AgencyID
Maximum Students
Term
Course Number
Title
Department
Class Start Date
Class End Date
Program
Level
Keyword
Bldg/Room
Days
Time
ClassSectionID

ClassSections

Term
AgencyID
Course Number
Title
Dept
Class Start Date
Class End Date
Program
Level
Keyword

Bldg/Room
Days
Times
Status
Enrolled
Maximum
Waiting
Complete
Last Date Hours Added
Weeks of Class
Hours per Week
Hours per Term
Organization
Location of Instruction
Location Type
Minimum Students
Variable Credit
Credits
Maximum Credits
Instructional Area
Class Meets Requirement
Language of Instruction
Cost
TotalPay
Current Hours Offered
Total Hours Offered
Class Section ID
Agency Name

ClassStaffAssignment

Assigned
AgencyID
Start
End
Status
Last Name
First Name
Primary
Title
Teaching Assignment
Scope of Assignment
Date
ClassSectionID

ClassStaffHours

Date
AgencyID
Last Name
First Name
Type
Hours Present
Hours Absent
Late
Date
ClassSectionID

Contacts

Last Name
AgencyID
First Name
SSN
ContactID
Status
Type
Keyword
PersonID

Custom PersonFields

AgencyID
Custom String 1
Custom String 2
Custom String 3
Keyword2
Custom Date 1
Custom Date 2
Custom Number 1
Custom Number 2
PersonID

DonationsReceived

AgencyID
Date
Type
Value
Deductible
Comment
Donor Name
Donation ID
DonorID

DonorComments

AgencyID
Date
Type
Comment
DonorID

DonorHeader

AgencyID
Name Donor Listed As
Status
Keyword
Donation
Total Donated
Amount of Last Gift
Date of Last Gift
Title/Prefix
Last Name
Middle Name
First Name
Company
Title of Position

Address1
Address2
City
State
Zip
Mail Preference
Home Phone
Work Phone
Mobile Phone
Fax
Pager
Other Phone
Other Phone Type
E-Mail
DonorID

DonorPledges

Date
Type
Value
Comment
DonorID

Donors

AgencyID
Last Name
First Name
Middle Name
Status
Keyword
Level
Donor Display Name
Status
Keyword
Mail Preference
Source Type
Donor ID
SSN
Company
PersonID

DonorStatusHistory

Agency ID
Start Date
Status
DonorID

Family

Agency ID
Family Name
Family Unique Number
Family Type
Family ID
Status
Keyword

FamilyHours

- Agency ID
- Date
- Type
- Hours
- Family ID

FamilyMember

- Family ID

FamilyStatusHistory

- Agency ID
- Start Date
- Status
- Family ID

FiscalYearRecords

- Agency ID
- Fiscal Year
- Reporting System
- Created Date
- Last Update
- Completed
- Reviewed
- Year
- PersonID

Groups

- Agency ID
- Group Name
- Main Tutor
- Group ID
- Status
- Program
- Level
- Keyword
- ClassSectionID

GroupStudents

- Agency ID
- Last Name
- First Name
- Status
- Start Date
- End Date
- Group
- Group ID

GroupTutorHours

- Agency ID
- Date
- Last Name
- First Name
- Type
- Hours Present
- Hours Absent

Late
ClassSection IF

Materials

Agency ID
Name
Copy #
Status
Type
Keyword
Level
Description
Cost
Material ID

PairHistory

Agency ID
Start Date
Status
Pair ID

PairInstructionalHours

Agency ID
Date
Hours Present
Student ID
Tutor ID

Pairs

Agency ID
Student Name
Tutor Name
Status
Program
Keyword
Level
Pair ID

Person

Agency ID
Last Name
First Name
Middle Name
Ethnicity
SSN
Birthday
Person ID
Student
Staff
Tutor
Donor
Contact
Volunteer

PersonAdddresses

Agency ID
Start Date
End Date
Address1
Address2
City
State
Zip Code
County
Area
Phone
PersonID

PersonAssessments

Agency ID
Fiscal Year
Date
Instrument
Form
Subtest
Level
Scaled
SPL/GLE
Assessed Level
Raw Score
Hours Since Last Assessment
PersonID

PersonClassHoursAttended

Agency ID
Date
Course Number
Class
Type
Hours
Absent
Late
Date
Course Code
PersonID

PersonComments

Agency ID
Date
Type
Comment
PersonID

PersonDemographic

Agency ID
Gender
Ethnicity
Birthdate
Birthdate Verification
Born Outside US

Country of Birth
Immigrant
US Citizen
Country of Citizenship
Marital Status
Number of Dependents
Registered Voter
Homeless
Residence Area
Public Assistance
Economic Disadvantage
Dislocated Worker
Displaced Homemaker
Migrant Worker
Employment Status
Military Service Experience
Family Income Range
Minor with Adult Status
Single Parent or Guardian
At Risk
Abuse
Correctional
Institutional
District
PersonID

PersonGoals

Agency ID
Date Set
Date Met
Status
Keyword
Type
Category
Date
Description
Included in Survey
Responded to Survey
Additional Details
PersonID

PersonIdentifier

Agency ID
Creation Date
Last Update
Identification Type
Document or ID Number
PersonID

PersonLanguages

Agency ID
Date Noted
Language
Language Type
Native
Speak

Read
Write
Language
PersonID

PersonLevelHistory
Agency ID
Date
Level
Subject Area
Level
Person ID

PersonPreferences
Agency ID
Effective Date
Item
Choice
Weight
Comment
Person ID

PersonProgramHistory
Agency ID
Program
Start Date
End Date
Status
Notes
Created
PersonID

PersonProgramRegistration
Agency ID
Program
1st Intake
Status
DateLeft
Exit Reason
PersonID

PersonWorkHistory
AgencyID
Start Date
End Date
Status
Occupation
Description
Salary
Employer
Person ID

SEAAgencyStudentGoals
Agency ID
Agency Name
Last Name

First Name
SSN
Date Set
Date Met
Status
Type
Category
Keyword
Program
OverallStatusCode
PersonID

StaffClassAssignment

Agency ID
Term
Course Number
Title
Primary
Assigned
Start
End
Status
StaffMemberID

StaffHistory

Agency ID
Start Date
End Date
Status
StaffMemberID

StaffHours

AgencyID
Term
Date
Title
Type
Hrs Present
Hrs Absent
Date
Person ID

StaffMemberQuickAdd

Agency ID
Last Name
First Name
Middle Name
Status
Title
Keyword
Department
Program
Level
Title/Prefix
Suffix
Address1

Address2
Zip
City
State
Mail Preference
Home Phone
Work Phone
Mobile Phone
Fax
Pager
Other Phone
Other Phone Type
E-Mail
SSN
Classification
Employment Status
Fulltime Position
FTE-Percent
Hire Date
Start Date
Level of Education Completed
Prior Related Exp-Years
Prior Teaching Exp-Years
StaffMemberID

StaffMembers

AgencyID
Agency Name
Last Name
First Name
SSN
Status
Program
Keyword
Department
Position Title
Job Classification
Staff ID
Employment Status
Fulltime
PersonID

StudentClassRegistrations

Agency ID
Letter Grade
Quality Points
Grade Points
Units
Variable Credit Class
Possible Credits
Earned Credits
Class Meets Requirement
Elective
Remedial
Honors
Standardized Test

Work Credit
Advanced Placement
Enroll Date
Enroll Status
Student Start Date
Student End Date
Fees Paid
Date Paid
Fee Amount
Term
Course Number
Title
Type
Course Code
Hours
Absent
PersonID

StudentDisability

Agency ID
Informed Disclosure Not Required
Apparent or Disclosed Disability
Vision Impaired
Legally Blind
Hearing Impaired
Deaf
Speech Impaired
Mute
Paralysis
Nonparalytic Orthopedic
Missing Extremities
Specific Learning Disability
PersonID

StudentEducation

Agency ID
Date First Intake
Admission Status – 4140
ESL Student
Last Enroll Date
Last School Attended
Highest Education Completed
Entry Grade Level
Source Type
Source Name
Why Enroll
Mandated Student Type
Post School Recognition – Graduation Exercises
StudentID

StudentKeyInfo

Agency ID
Intake Date
Student Unique Number
Address1
Address2

Zip
City
State
County
Mail Preference
E-Mail
Phone at Address
Home Phone
Work Phone
Mobile Phone
Fax
Pager
Other Phone
Other Phone Type
Contact Preference
Student ID

StudentPairs

Agency ID
Match Date
Start Date
End Date
Status
Tutor First Name
Tutor Last Name
Hours
Student ID

Students

Agency ID
Agency Name
Last Name
First Name
SSN
Program
Keyword
Keyword2
Entry Level
Current Level
Subject Area
Assessment Status
Ethnicity
Gender
Employment Status
ESL Student (Y/N)
Disability
Correctional
Institutional
Completed Level
Student Unique Number
Student ID
Status
Person ID
Address1
Address2
State City

ZipCode

TutorComments

Agency ID
Date
Type
Comment
Tutor ID

TutorGroupAssignment

Assigned
Start
End
Status
Last Name
First Name
Primary
Group
Program
Tutor ID
Group ID

TutorHistory

AgencyID
Start Date
End Date
Status
Program
TutorID

TutorPairs

Agency ID
Match Date
Start Date
End Date
Status
Student First Name
Student Last Name
Hours
TutorID

Tutors

Agency ID
Address1
Address2
City
State
Zip
Home Phone
Work Phone
Mobile Phone
Fax
Pager
Other Phone
Other Phone Type

E-Mail
SSN
Highest Level of Education Completed
Previous Tutoring Experience
Completed Initial Training
Date First Tutored
Last Name
First Name
Middle Name
Status
Keyword
Level
Program
Intake Date
Mail Preference
Contact Preference
Source Type
Source Name
Initial Training – Completion Note
Still Available – wait match
Date Left
Reason Left
Gender
Ethnicity
Tutor ID
Keyword2
Person ID

VolunteerHours

Agency ID
Date
Type
Hours
Comment
Volunteer ID

VolunteerKeyInfo

AgencyID
Intake Date
Title
Address1
Address2
City
State
Zip
Mail Preference
Home Phone
Work Phone
Mobile Phone
Fax
Pager
Other Phone
Other Phone Type
E-Mail
VolunteerID

Volunteers

- Agency ID
- Last Name
- First Name
- SSN
- Volunteer ID
- Status
- Type
- Keyword

VolunteerStatusHistory

- Agency ID
- Start Date
- Status
- Volunteer ID

WorkshopLogistics

- Agency ID
- Minimum Students
- Cost
- Location of Instruction
- Notes/Meeting details
- ClassSectionID

WorkshopRegistration

- Agency ID
- Last Name
- First Name
- Enroll Status
- Workshop Start Date
- Workshop End Date
- Min Reqd Days
- Days Present
- Hours Present
- Enroll Date
- Student Start Date
- Student End Date
- ClassSectionID

Workshops

- Agency ID
- Session Name
- Session ID
- Type
- Status
- Keyword
- ClassSectionID