

USING REPORTS



*** IMPORTANT ***

Printer Settings

The printable reports in SuperFox use your printer's paper settings. Even if you do not use a printer with your computer please check that you have one set up.

The printed reports are formatted to fit on A4 paper. Sometimes new computers arrive with default paper size set to the American size Letter and this will cause the printed reports to paginate incorrectly. If you notice that the printed reports look oddly set out please go to your computer's Control Panel options and check the printer settings in:

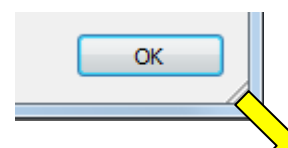
- 'Devices and Printers' (Windows 7, Windows Vista)
- 'Printers and Faxes' (Windows XP)

The Report Viewer

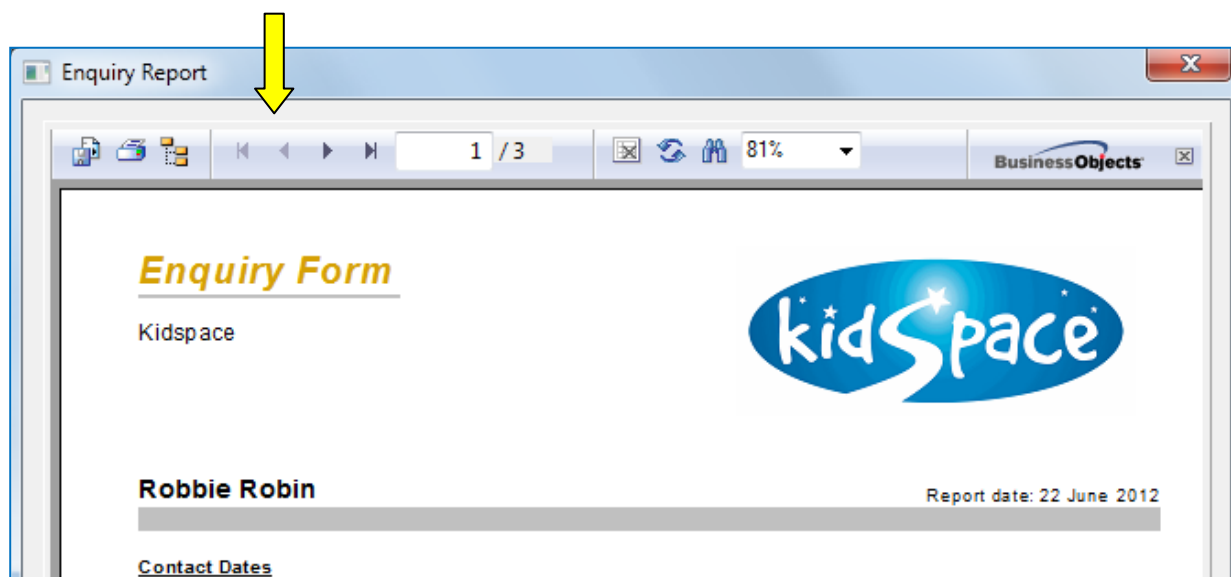
The SuperFox printed reports are displayed in a pop-up viewer.

If the viewer looks small (it often does the first times you use the program) use your mouse and drag the lower right corner out to make the viewer bigger.

Tip! Always use the 'OK' button to close the report. If you use the red cross at the top of the viewer it is remarkably easy to fluff it and close SuperFox by mistake.



We use the report by using the toolbar buttons at the top of the viewer.

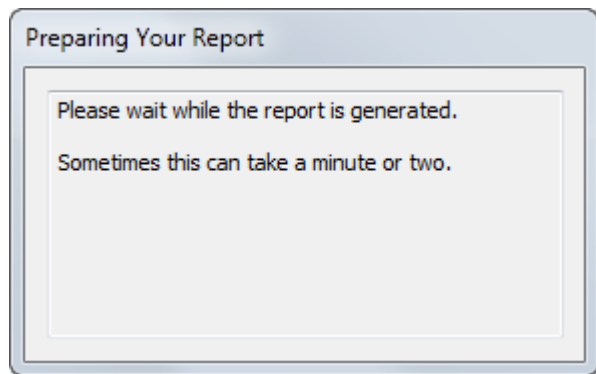


Time To Prepare Reports

It will take a few seconds to produce the first report that you produce in a SuperFox session while the viewer configures itself. Subsequent reports re generally much quicker.

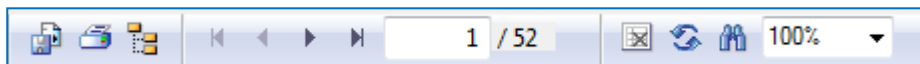
Some reports require a lot of behind-the-scenes computing such as invoices and headcount returns. These will take a few seconds to appear.

The 'Preparing Your Report' pop-up will be displayed while this happens.



Toolbar Controls

The toolbar is present at the top of the printed reports, it is simple to use.



The toolbar controls are, from right to left:



These buttons allow you to save/export (diskette button) and print the report.



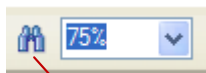
This button lets you step through any groupings in the report (described on page 3)



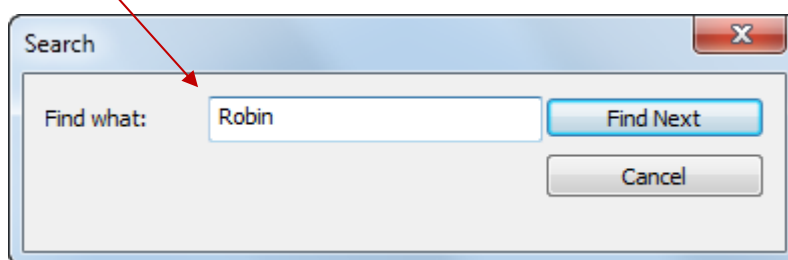
These buttons let you go to the first, previous, next or last pages, or to go to a specific page number



The cross in square button stops the report from loading, the circular arrow button refreshes the report data.



The binocular button allows you to find a word in the report. The % drop-down allows you to change the report size on your computer screen, it does not affect the printed report size.



If you press the 'Search' button it will pop up a little dialog asking what you would like to find.

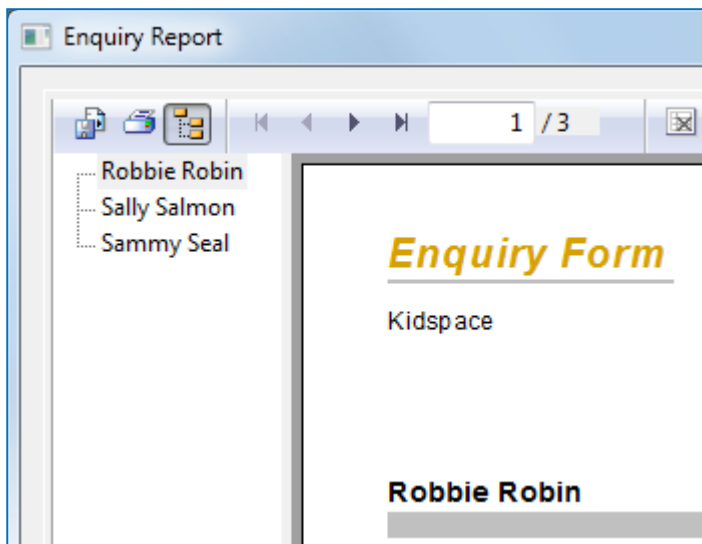
Use the Find Next button to search the report for the word you entered.

The Group Tree Button

Many SuperFox reports can be navigated using the Group Tree button.

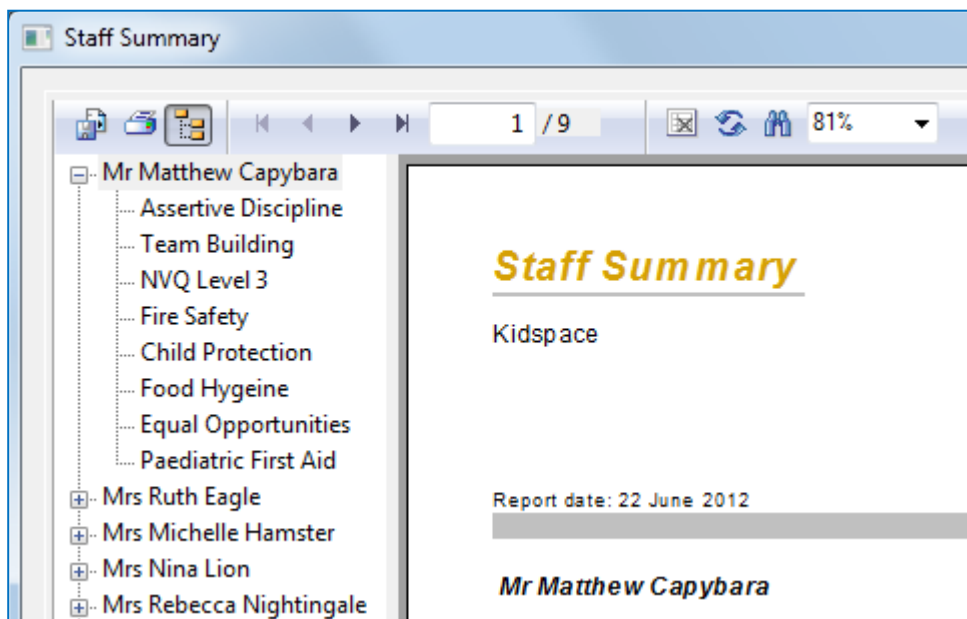
(The Waiting List Enquiry report below has pages grouped by child's name. When you press the Group Tree button a list of the children in the report is displayed on the left side of the window.)

Clicking on a child in the list will take you straight to the child's page in the report. Once you have clicked into the list if children you can use your keyboard up and down arrow keys to move quickly from child to child.



This feature is especially useful for rapidly proof reading customer facing reports such as the invoices, or staff payslips. When you have produced a batch of invoices or reminders it only takes a few seconds to check through them before printing if you move through the group tree list using your keyboard up and down arrow keys.

A few reports have multi-level groups. For example the staff summary report contains a group of qualifications held for each staff member.

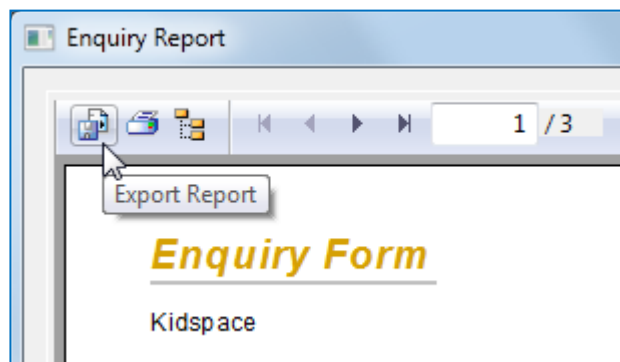


Not all reports are grouped in this way and if the report lacks groups the group tree list will be blank.

Saving Reports

You can save SuperFox reports in a variety of formats by pressing the **'Export Report'** button at the left end of the report toolbar. The three most useful options are described here:

- PDF
- Spreadsheet or CSV
- RTF (Word / Open Office)



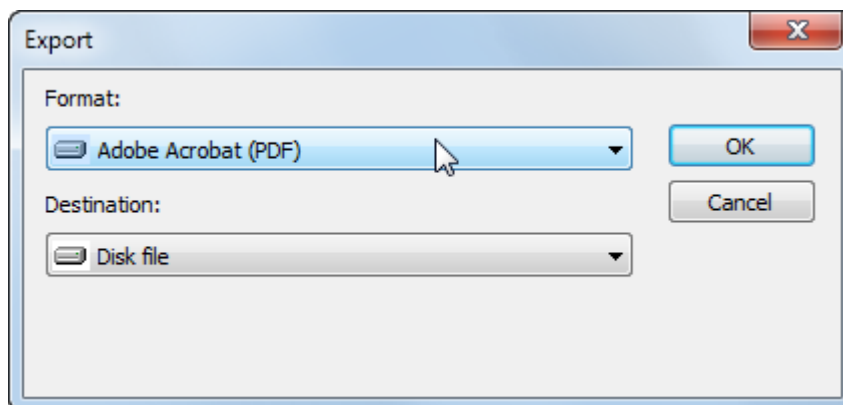
Saving As A PDF Document

This is a good choice if you want to give the document to somebody to read electronically. Obviously be careful if the report contains sensitive information such as children's details.

PDF documents can be read by anybody using a PC or an Apple computer using a PDF reader such as Adobe's free Acrobat Reader software).

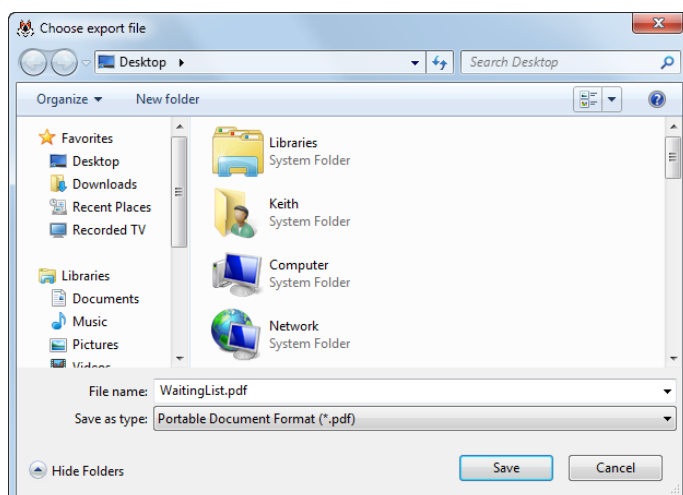
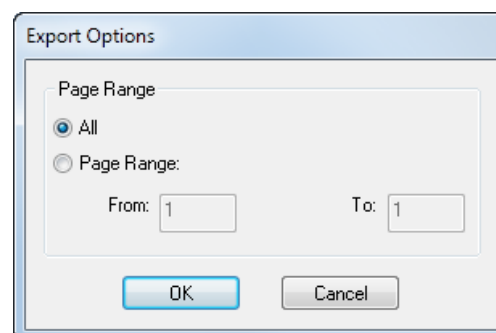
To export as PDF choose:

- Format: 'Adobe Acrobat (PDF)'
- Destination: 'Disk file'



You will then be asked to choose the page range to export.

(This is very handy as many SuperFox reports have different sections and you may only be interested in some of the sections.)



Finally you will need to browse for a folder where you would like to save the report.

It is a good idea to choose a name that is different from the name supplied by SuperFox if you want to tell the report apart from others of the same type.

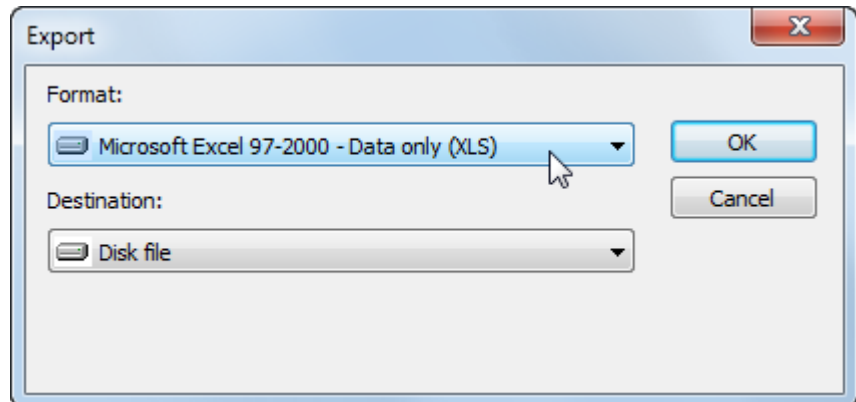
Saving As An Excel Spreadsheet or CSV File

Some reports export very well to Excel (*.xls) format, and this will also work well in Open Office. This is very useful if you would like to copy and paste the data into your own spreadsheets.

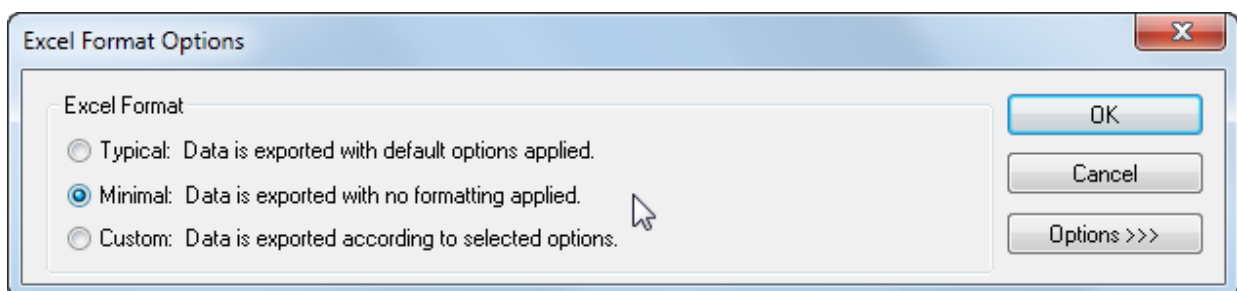
(Several reports, for example The Early Years Census Pupil Data report, are designed with this in mind).

To export as XLS choose:

- Format: 'Microsoft Excel 97-2000 - Data only (XLS)'
- Destination: 'Disk file'



A screen will appear asking you to specify some Excel format options. A reliable option is to choose the 'Minimal' formatting option shown in this screen shot:

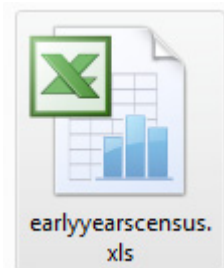


You will not be asked to supply a page range to export, all of the report data will be exported to the XLS file. You will just need to choose a destination folder and a name for your exported file as we did in the PDF example.

You will probably need to tidy up the resulting spreadsheet a little but the data can be easily copied and pasted into your own spreadsheet.

Spreadsheet-friendly reports include:

- Sales, Funded and Balance summaries associated with Invoice batches
- View A Family's Accounts balance reports
- Usage Bar Chart and FTE Bar Chart attendance figures
- Early Years Census pupil level data
- Staff Pay summary reports



CSV Files

*** IMPORTANT * Not all reports will export successfully to CSV using the CSV export option.**

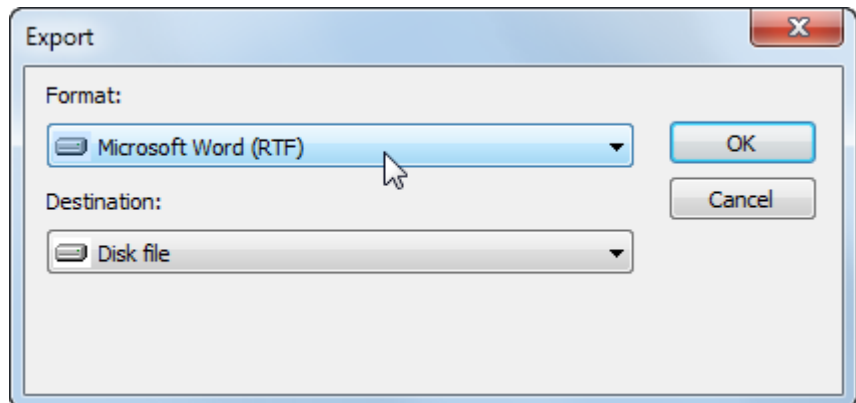
If you want to produce a CSV file we would recommend that you first export the report to a spreadsheet as described above, check the data and then save from the spreadsheet in CSV format.

Saving As A Word / Open Office Document

You can work with the report in Word or Open office by exporting it as a RTF document. This is handy if you want to include content from the report in another word processed document.

To export as RTF choose:

- Format: 'Microsoft Word (RTF)'
- Destination: 'Disk file'



You will be asked to choose a page range, a destination folder and a file name in the usual fashion.

Tip! RTF files can be quite large. You will probably be able to shrink the size of your document by opening the RTF file using Word / Open Office and then saving it in you word processor's usual format, such as a *.doc document for Word.

End