

User Guide

ReportWorks Developer Application



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Welcome

Welcome to ReportWorks!

ReportWorks is the next-generation custom report development solution from Pearson.

ReportWorks provides the tools to give school administrators and staff an easy way to find, evaluate, and share the information that is available in the Pearson school information system (SIS). ReportWorks features robust reporting capabilities, drag-and-drop report layout design, and trend analysis capability.

User Roles

The following section outlines the defined user roles in ReportWorks.

Report Developer

Report developers are responsible for the creation, publication, and maintenance of reports through the ReportWorks application.

Report Generator

Report generators are SIS users responsible for entering report parameters, generating reports, and delivering the resulting output to report consumers.

ReportWorks Administrator

ReportWorks administrators are responsible for assigning system access for Report Developers, as well as creating report categories and controlling preferences within the SIS.

Get Started

About Getting Started

To get started using ReportWorks, you must log in to the application from the SIS. When you log in, the ReportWorks launch page allows you to open an existing project, a project based on a pre-configured template, or a new project.

Note: Security permissions must be set in the SIS in order to log in to ReportWorks. For more information, consult the Security section of the SIS user guide or the SIS online help.

Launch ReportWorks

Launch and log in to ReportWorks from the SIS.

How to Launch ReportWorks

PowerSchool

1. Log in to PowerSchool.
2. On the start page, do one of the following:
 - Choose **ReportWorks** from the main menu.
 - Choose **Reports > Setup > ReportWorks**.

The Launch ReportWorks page appears.

2. Click **Launch**.
3. On the ReportWorks login screen, enter the username and password and then click **Login**.
4. On the ReportWorks launch screen, select an option.

Chancery SMS

1. Log on as a school administrator.
2. In the control bar, under **Admin**, click **School Setup**.
3. On the **School Setup** page, under **ReportWorks**, click **Developer Application**.
4. On the ReportWorks login screen, enter the username and password and then click **Login**.
5. On the ReportWorks launch screen, select an option.

Navigating ReportWorks

When you log in to ReportWorks you see the following main areas:

- Navigation Bar
- Main Menu
- Projects Pane

Navigation Bar

The navigation tabs appear at the top of the ReportWorks start screen and are common to most screens in the application. Click the arrow next to the Details tab to show or hide the tab icons.

The navigation tabs includes the following information:

Field	Description
Details	Click to view the Project Details window to create or edit a project name and description and select a Data Set for the project.
Scope	Click to view the Scope window to create boundaries and establish runtime controls for the project.
Layout	Click to view the Layout window to establish a layout for the report project.
Publish	Click to view the Publish window to select the publishing options for the project.

Main Menu

The main menu appears at the top of the screen and includes pop-up menus you can use to access each feature in ReportWorks. These features are organized by the following menus:

Note: When the Layout tab is selected, different menus appear. See **Layout window** for more information.

Menu	Description
ReportWorks	Use the pop-up menu to select one of the following commands: <ul style="list-style-type: none"> • About ReportWorks • Services • Hide ReportWorks • Hide Others • Show All • Quit ReportWorks
File	Use the pop-up menu to select the following command: <ul style="list-style-type: none"> • Save • Export Current Project

Menu	Description
	• Import Project
Help	Click Contents to open the ReportWorks help project.

Projects Pane

A list of your current projects is displayed in the Projects pane. In this pane, you can rename, load, and delete existing report projects. You can also add folders to help organize your projects.

Quit ReportWorks

When you are finished working in ReportWorks, it is important to quit the application.

How to Quit ReportWorks

- From the ReportWorks menu bar, choose **ReportWorks > Quit ReportWorks**.

ReportWorks Help

About ReportWorks Help

ReportWorks help provides comprehensive information on navigating and using ReportWorks.

Set Browser Preferences

Before you begin using ReportWorks help, check your browser preferences to make sure your browser is set to open in a new window. If you do not set your browser to open in a new window, the help window launches in the existing open window.

Also, if you are using Internet Explorer, you must add ReportWorks to the list of trusted Web sites.

Note: Supported browsers include Firefox 3, Internet Explorer 7, and Safari 3.

How to Set Browser Preferences for Firefox

1. Open **Firefox**.
2. From the menu bar, choose **Firefox > Preferences** (Mac) or **Tools > Options** (PC).
3. Click **Tabs**.
4. In the "New pages should be opened in" section, select the **a new window** option.
5. Click the **Content** tab.
6. Deselect the Block pop-up windows checkbox.
7. Click **OK**, or close the dialog.

How to Set Browser Preferences for Internet Explorer

Note: For PC users only.

1. Open **Internet Explorer**.
2. From the menu bar, choose **Tools > Internet Options**.
3. Click the **General** tab.
4. In the "Open links from other programs in" section, select the **A new window** option.
5. Click the **Security** tab.
6. Select **Trusted Sites**.
7. Click **Sites....**
8. In the "Add this Web site to the zone" field, enter the URL for ReportWorks.
9. Click **OK**.

10. Click the **Privacy** tab.
11. In the "Pop-up Blocker" section, click **Settings**.
12. In the "Address of website to allow" field, enter the URL for ReportWorks.
13. Click **Add**.
14. Click **Close**.
15. Click **OK**.

How to Set Browser Preferences for Safari

1. Open **Safari**.
2. From the menu bar, choose **Safari > Preferences** (Mac) or **Edit > Preferences** (PC).
3. Click the **General** tab.
4. In the "Open links from applications" section, select the **in a new window** option.
5. Close the dialog.
6. On the menu bar, choose **Safari** and verify that Block Pop-Up Windows is not selected.

ReportWorks Help Window

The ReportWorks help window is divided into two panes, the navigation pane on the left and the topic pane on the right.

Navigation Pane

The navigation pane on the left contains the **Contents**, **Index**, and **Search** tabs, as well as navigation buttons you use to access and navigate the help topics.

Contents Tab

The **Contents** tab shows the organization of the help into folders. Each folder contains related topics with conceptual and procedural information.

- Click **Contents** to view a complete list of the different folders.
- Click a folder to show the topics related to that section.
- Click the folder again to hide the topics related to that section.
- Click a topic to view the information in the topic pane.
- Click **X** to hide the navigation pane.

Index Tab

The **Index** tab provides a way to search for information interactively. The index behaves differently depending on the computer you are using.

- If using Mac, topics are sorted by alphabetical listing. Click the letter that corresponds to the first letter of the index entry you want, and then click the topic. The information appears in the topic pane.
- If using Windows, a text field appears. Click **Index** and enter a keyword or phrase in the text box. The topics containing the index term display below the text box. Click the appropriate topic and the information appears in the topic pane.

Search Tab

The **Search** tab provides a way to locate occurrences of a specific word or phrase in the help. Click **Search**, enter a keyword or phrase in the text box, and then click **Go**. The topics containing the search phrase display below the text box. Select the appropriate topic and the information appears in the topic pane.

Topic Pane

The topic pane on the right displays individual help topics, such as information about ReportWorks concepts or step-by-step procedures for using specific ReportWorks features.

If you access the ReportWorks help window from the menu bar or by using the command keys the topic pane displays the first topic within the ReportWorks help, the *Introduction* section.

If you access the ReportWorks help window by clicking the **Help** icon, the topic pane displays context sensitive information specific to the ReportWorks window you are viewing. Click **Show** to display the entire help project, including the table of contents.

Links

Within help topics are links to additional information or procedures. These links display as underlined text. Click the underlined text to display the additional information.

Launch ReportWorks Help

After you have launched ReportWorks, you can then launch the ReportWorks help window from the menu bar, by using the command keys, or simply clicking the Help icon, which looks like a question mark.

How to Launch ReportWorks Help

Do one of the following:

- From the ReportWorks menu bar, choose **Help > Contents**.
- Press **COMMAND+SHIFT+?** (Mac).
- Press **F1** (Windows).
- Click the **Help** icon.

Note: You can resize the help window and move the help window to a convenient location on your desktop, so you can work with ReportWorks. The ReportWorks help window remains open until you choose to close it.

Report Projects

About Projects

The function of a report project is to contain the various components needed to create, publish, and maintain a report. These components do not exist outside of a report project, making report project creation the requisite first step in the report creation process.

When you create a project from scratch, you select a data set on which to base the report content. The data set contains groups of data objects that represent different information stored in the database.

With the data set selected, you move on to the Scope window, establishing data boundaries through the creation of filters, and selecting runtime controls to allow report generators to refine the report output at runtime.

On the Layout window you establish the look of the report. In addition, you can modify the selected data objects to further refine your report output. You can also add text and graphic elements. The Preview feature allows you to view the rendered report prior to publication, using a sample of data from the database.

Once the project meets your specifications, use the Publish window to select the publications options, such as the report category assignment, the schools to which the report will be made available, and specific user roles that can access the report.

As a report developer, you are the creator and user of report projects.

Work with Templates

Several project templates are provided in ReportWorks. When you create project based on a template, the Data Set, applicable filters, and layout have all been configured for you. You can save the template as a project and then change any aspects of the template to fit the needs of your project.

Create a New Project

New report projects can be created on the launch page, or from the Projects pane.

How to Create a New Project

1. Do one of the following:
 - a. On the ReportWorks launch page, select **Project based on a template** or **Project from scratch**.
 - b. On the ReportWorks Projects pane:
 - i. Click **+add**, and then select **Add Project** from the pop-up menu. Untitled Project appears in the Projects pane.
 - ii. Double-click on **Untitled Project**. The Project Details for the specified report appear.

The Project Details window appears.

2. Enter a name for the report project in the **Project Name** field.
3. Enter a description in the **Project Description** field.
4. Select the set of data for the project from the **Data Set** pop-up menu.
5. Select **Scope** on the navigation bar to display the **Scope window** and create boundaries and runtime controls for the project.
6. Select **Layout** on the navigation bar to display the Layout window and create a report layout.
7. Select **Publish** on the navigation bar to display the Publish window and publish the report to the SIS.

Create a Project Folder

Create folders in the Projects pane to help organize your report projects.

How to Create a Project Folder

1. On the Projects pane, click **+add**. A pop-up menu appears.
2. Select **Add Folder**. Untitled Folder appears in the Projects pane.
3. Right-click (or press **CTRL+click**) on the untitled folder and select **Rename Folder** from the pop-up menu. The folder name appears shaded.
4. Enter the new name for the folder and then press **Enter**.

Move Projects into Folders

Once folders are created, you can move projects into folders to keep your project organized.

How to Move a Project into a Folder

1. On the Projects pane, create a project and a project folder.
2. Rename the folder.
3. Drag and drop applicable projects into the folder.
4. Right-click (or press **CTRL+click**) on the untitled folder and select **Rename Folder** from the pop-up menu. The folder name appears shaded.
5. Enter the new name for the folder and then press **Enter**.

Open an Existing Project

When launching ReportWorks, you can open an existing project from the launch page. When ReportWorks is open, use the Projects pane to open an existing project.

You can perform this procedure from any tab in ReportWorks.

How to Open an Existing Project

1. On the Projects pane, double-click on the name of the project you want to open. The report project appears.
2. Edit the project elements on the **Scope** or **Layout** windows.

Note: If changes are made to a project with a Published State of **Published**, the report must be unpublished, then published again in order for the changes to appear on the report in the SIS. For more information, see [Updating a Published Report](#).

Delete a Project or Folder

Delete report projects from the Projects pane.

How to Delete a Project

1. Do one of the following:
2. On the Projects pane, right-click (or press **CTRL+click**) on the project or folder you want to delete and select **Delete Project** or **Delete Folder** from the pop-up menu.
3. On the Projects pane, select the project or folder you want to delete and click - **delete**.
4. A Delete Confirmation dialog appears.

Note: When deleting a folder, all projects included in the folder are deleted as well.

5. Click **Delete**. The report or folder is removed from the Projects pane.

Setting Project Scope

About Setting the Project Scope

Setting the project scope involves working with the data objects contained in the selected Data Set. Use the **Scope window** to construct boundaries within a report project. Data objects, filters, and runtime controls all combine to determine the data on the report output.

Data Objects

Data objects represent data within the SIS database, and play an important role in report production. These objects allow report developers to construct reports containing dynamic SIS database content.

In ReportWorks, data objects are organized into data sets that align with the way you most commonly approach organization of school/district information. This structure appears in ReportWorks as a **Data Set panel** that allows you to select specific data objects for inclusion in a query.

Data objects typically represent column row values within the SIS database. These objects are used to present values within the SIS database on ReportWorks reports, such as a student's first name, gender, or grade level.

Custom Field Updates

When custom fields are edited, added, or removed in the SIS database, the changes are not immediately reflected in the ReportWorks data set.

In Chancery SMS, the data set is updated once the View Generator process is complete. In PowerSchool, a restart of Tomcat is required to update the data set.

Boundary Filters

It is important to understand that filters function in a hierarchical structure with the SIS. The automatic data filtering at the school level, used to ensure that report generators are only able to view data for students within their school, takes precedent over all other filters and cannot be overridden or disabled. The boundary filters are the second filtering level. Runtime controls are the final filter level. The following chart illustrates how filters are applied to the data objects.

Note: Data objects that appear shaded cannot have filters or runtime controls assigned to them. This includes custom fields.

Filters are created in Boundaries mode on the Scope window. Use filters to further refine the scope of data to be included in report output by specifying the rows to be included. For example, a report developer may be constructing a query using the context of student demographic information, and may wish to only include students with a birth date greater than 12/31/2000. To accomplish this, the report developer would select the **Date of Birth** data object, select the logical operator of greater than (>), and enter the conditional value of **12/31/2000**.

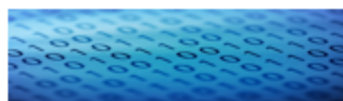
Report developers can create one or many filters to refine the scope of data rows, and can define relationships between these filters. See the [boundary filter examples](#) for additional information.

Filters follow a hierarchical relationship. See [Work with Filters](#) for an illustration.

On the [Scope window](#) you build the query that is applied to the data set when you generate the report or open the [Layout window](#).

Work with Filters

The following chart illustrates how filters are applied.



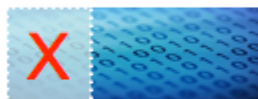
Potential Report Data

Based on Data Objects in Project Layout



Level 1 - School Context Filter

Removes students that are not associated with the school within which the report generator is associated



Level 2 - Boundary Filters

Removes records based on the boundary filters established in the report project by the report developer



Level 3 - Runtime Filters

Removes records based on the use of runtime options by the report generator



Actual Report Data

Based on the potential report data and all levels of filtering

Boundary Filter Examples

Use the following filter examples to assist you in establishing boundaries for the report.

Example 1

Find all students with enrollment records in Apple Grove High School or students in Continuation School with a grade level greater than 8 or a date of birth greater than 1/1/1995.

School_Name = Apple Grove High School
OR
School_Name=Continuation School AND Grade_Level>8
OR
School_Name=Continuation School AND Date_of_Birth>01/01/1995

Example 2

Find any student class enrollments where the course name is Algebra 1 and the room number is 15 or 16.

Course_Name = Algebra 1
AND
Room_Number=15
OR
Room_Number=16

Runtime Controls

ReportWorks provides predefined runtime controls that report developers can select to provide flexibility for report generators. For example, when running the report, the report generator can choose which grade level will appear on the report output from the list that displays in the SIS. These options are available in Runtime Controls mode on the Scope window. Preview settings are also contained in this area. Preview settings are used in conjunction with Boundary filters to determine the data contained in the sample data set that is used when previewing the report in Layout. Preview settings do not affect published reports.

Create Project Scope

Create the project scope using boundary filters and runtime controls.

How to Create Project Scope

1. Create a report project, or select an existing report project from the **Projects pane**.
2. Select an data set from the **Data Set** pop-up menu.
3. Click the **Scope** tab. The **Scope window** appears.
4. Click **Boundaries**.
5. On the Data Set panel, click on a data object group (indicated by the arrow icon). The data objects associated with that group appear.
6. Select a data object to which you would like to assign a filter, and then drag and drop it on the shaded area of the window. The **Add Filter dialog** appears.

Note: Data objects that appear shaded cannot have filters assigned.

7. Select the appropriate operator and enter filter criteria in the field, then click **OK**. The filter you assigned displays on the Scope window.

Note: For more information, see Filter Examples.

8. Continue to add filters as needed.
9. Click **Runtime Controls**.
10. Select the Developer Preview Controls from the pop-up menus.
11. Select the applicable checkbox for the Published Report Runtime Controls.
Note: The Preview Values are used to display a report preview on the **Layout window** only. When Runtime Controls are enabled, the report generator selects the appropriate values at runtime.
12. Click the **Layout** tab to configure the report layout.

Note: Scope selections are automatically saved when a different tab is selected.

Edit Project Scope

Edit the project scope that you previously created.

How to Edit Project Scope

1. On the **Projects pane**, double-click on the project name. The project details appear.
2. Click the **Scope** tab. The **Scope window** appears.
3. Click **Boundaries** to edit filters. For more information, see **Edit Boundaries**.
4. Click **Runtime Controls** to **edit the runtime controls**.

Note: Scope edits are automatically saved when a different tab is selected.

Edit Boundaries

Edit the project scope boundaries to change the scope of data that can be included in the report.

How to Edit Boundaries

1. Click the **Scope** tab. The **Scope window** appears.
2. Click **Boundaries**. The existing filters appear.
3. Right-click (or press **CTRL+click**) on a filter and select **Edit Filter** from the pop-up menu. The Edit Filter dialog appears.
4. Make changes to the operator and data field as needed. For more information, see Filter Examples or Add Filter Dialog.
5. Click **OK**. The Edit Filter dialog closes.
6. To move a filter to a different filter group, hover the pointer over the filter and click on the blue arrow.

Note: Alternately, right-click (or press **CTRL+click**) on the filter and select **Move Filter Up** or **Move Filter Down** from the pop-up menu.

7. To group different filter groups together, hover the pointer over a group and click on the blue arrow.

Note: Alternately, right-click (or press **CTRL+click**) on the group and select **Move Group Up**, **Move Group Down**, or **Ungroup Filters** from the pop-up menu.

8. To change the relationship between filter expressions or filter groups, select the **AND/OR** button.
9. To delete a filter or group, click **minus (-)** next to the filter or group.

Note: Alternately, right-click (or press **CTRL+click**) on the filter or group and select **Delete Filter** or **Delete Group** from the pop-up menu.

Note: Filter changes are automatically saved when a different tab is selected.

Report Layout

About Report Layout

The report layout controls the look and design of the report. You can add data objects, images, shapes, colors, and text to the layout. When you select the Layout tab, the ReportWorks menu bar provides additional options to assist you in building your report. There are different Inspector panels that you use to manipulate data, graphics, and tables on the Layout window.

Use key element groups to create data structures (tables, graphs, and labels), and drag and drop data objects into the structures to include data from the SIS database in the report.

Several different Inspector panels are available that allow you to control different attributes of the layout. For more information, see [Work with the Inspector Panels](#).

Prerequisites

Before creating the report layout, assure the following steps are completed:

- Select a Data Set
- Create Boundaries

Data Objects on the Layout Window

Data objects can be dragged from the Data Set panel and dropped onto the [Layout window](#) (in most cases, into a table, graph, chart, or labels) to customize reports. You can add different modifiers to the data objects as well to obtain a more refined report result.

When you drag and drop data objects on the Layout window, they are delineated by @ symbols. ReportWorks evaluates the data contained within the @ symbols, including modifiers, and returns the data when the report is rendered.

When you drag and drop the data object on the Layout window, you see the object name within the @ symbols, such as @school_year@. You will also see specific path notations, which indicates a reference to a parent group and potentially a grandparent group. This path links the object back to the associated key element group (see [Data Set Key Element Groups](#)) and will contain all groups between the object and the key element. An incorrect path will produce invalid data or no data at all. These paths are noted by a "." (dot).

Important Note: Data object paths are formulated when you begin to drag an object, and are based on the focused item in the layout. It is important the table, graph, label, or cross tab to which you are adding the object is the selected object in the page prior to dragging the object. Incorrect paths are fairly easy to identify, as they should never contain the name of the key element used to create the table, graph, label, or cross tab.

You can also mix fixed text with the data objects.

In this example, you add text before and after data objects for the report title:

Enrollment Report for School Year @school_year@ at @school_name@

displays as

Enrollment Report for School Year 2009-2010 at Apple Grove High School

Using the @ Symbol as Static Text

To specify the @ symbol as static text in a string or as text on the report layout, use two of the symbols together. For example, john@@domain.com displays as john@domain.com on the report output.

Key Element Groups

Key element groups within the data set (such as Student, Class_Enrollments, School_Enrollments) are special groups that are used on the Layout window to create data structures such as tables, graphs, and labels. These key elements are indicated on the Data Set panel with a small icon to the left of the group name. Once a data structure is created, any data object that is contained in the key element group, or within a child group may be used to populate the structure.

A child group is any group that contains data objects that have a one-to-one relationship with the key element group. For example, if the key element Student is used to create a table, any groups containing objects that have a one-to-one relationship to a student (such as demographic information or personal information) may be added to the table. However, data objects within the School_Enrollments and Class_Enrollments key elements cannot be added to that table, as there is a one-to-many relationship between a student and these objects.

The easiest way to determine if a data object can be included in a specific data structure is to check the path in the Data Set panel from the key element group to the object. If another key element group is in the path, the object cannot be used, as the object is the child of a different key element.

One-to-one Relationship

A student's personal information has a one-to-one relationship to the student record. For example:

Student

- Name
- Address
- Gender

One-to-many Relationship

A student's school enrollments and class enrollments all have a one-to-many relationship with the student record. A student has multiple school enrollments and each school enrollment may have multiple class enrollment records. For example:

Student

Primary School Enrollment

- Class Enrollment 1
- Class Enrollment 2

Junior High School Enrollment

- Class Enrollment 1
- Class Enrollment 2
- Class Enrollment 3
- Class Enrollment 4

Key Element Group Example

On the Layout window, you create a table using the key element group **Student**.

Data Set			
Student	Contact	Class_Enrollments	Course
Date	Custom_Fields	Grade_Level	Section
Page	Date_Time	School_ID	Course_Enrollment_End_Date
PageMax	Demographic	School_Name	Course_Enrollment_Start_Date
Page of PageMax	ID	School_Year	
PageBreak	Schedule_Setup	Student_Entry_Code	
PageBreakMax	School_Enrollments	Student_Entry_Date	
PageBreakPage		Student_Exit_Code	
PageBreakPageMax		Student_Exit_Date	
Row		Year_ID	

For each student, a single row in the table is produced.

If you then add the Start_Date from the Class_Enrollments key element group to the table, how does the system know which, of the many class enrollment start dates, should be placed in the row for a given student? The system will simply obtain the first record it locates and include the value in the row. This same behavior will occur if you attempt to place most data objects.

As shown in the one-to-many example above, a student has many class enrollment records, but the table produces one row per student. When creating a single table, you must use the data objects within that key element group in order to produce valid data. However, table groups can be used to cycle through the different key elements in each table and produce valid data.

Data Objects Modifiers

Modifiers can be used in conjunction with data objects to create more robust reports. Adding these modifiers on the Layout window provides the ability to expand the report output, or refine data to specified details.

Note: All modifiers are case sensitive. Use them in the format provided in the following tables.

Aggregate Modifiers

Format: @[modifier].[Data Object]@ OR @[modifier]@

Example: @count@ (used in a grouping row of a table)

Result: If applied to a grouping row in a table, produces a count of the number of rows in the group. For example, if a grouping is created using student ethnicity, a count is produced for each group of students that share the same ethnicity value.

Example: @total.[any numeric data object]@ (used in a grouping row or a summary row of a table)

Result: If applied to a grouping row in a table, produces the sum of the specified numeric data object values in a group.

Modifier	Description
total	Calculates the total for numerical values
average	Calculates the average for numerical values
count	Used within a table, graph, or crosstab to display a count of the number of rows in a group. In most cases, this modifier is used within a data structure (table, graph, etc). Within this context, this modifier is typically used without a reference to a specific data object. For example, if you create a table using the key element group Student, and you group the table rows by Ethnicity/Ethnic Code, you can add @count@ to a cell in the Ethnicity details row. This produces a count of the number of records in each group (if there were 20 students with the ethnicity value of "M", the count value for that group is 20).
max	Used within a table, graph, or crosstab to display the value of the data object record containing the largest numerical value.
min	Used within a table, graph, or crosstab to display the value of the data object record containing the smallest numerical value.

Conditional Modifier

The conditional modifier is used to evaluate a statement and produce the specified true or false value based on the result. The false result value is optional, and if not specified, null value will be used if the result is false (how null is interpreted depends on the operation). Null value can be specified by entering two sets of double quotes ("").

Format: @[Data Object][operator] ["value"]?[true result]:[false result] or [Data Object]?[true result]:[false result]

Example: @grade_level=="9"? "Freshmen":grade_level@

Result: Report displays Freshmen for any student in grade level 9, and for all others enters the grade level

Example: @grade_level>="9"? "Yes": "No"@

Result: Report displays Yes for any student in grade level 9 or above, and No for all others

Example: @grade_level==" "? "Value Does Not Exist ": "Value Exists"

Result: Report displays Value Does Not Exist for any student that does not have a grade level value, and Value Exists for any student that does have a grade level value

Modifier	Instruction
? and :	Used to evaluate a statement and produce a result value based on a true or false result. The question mark (?) separates the statement from the result values and the colon (:) separates the true result value from the false result value.

Operators

The following operators can be used in conjunction with the conditional modifier:

Parenthesis	(expr)	Nested expression. A portion of an expression can be enclosed in parenthesis to guarantee precedence.
Greater-than	>	Greater-than a specified value.
Less-than	<	Less-than a specified value.
Greater-than-equal-to	>=	Greater-than or equal to a specified value.
Less-than-equal-to	<=	Less-than or equal to a specified value.
Equal	==	Equal to a specified value
Not equal	!=	Not equal to a specified value.
Logical AND	&&	Produces a value of true if and only if both elements are true.
Logical OR		Produces a value of false if and only if both elements are false.

Heritage Modifier

Format:@[Parent].[Data Object]@

Example: @Parent.Student_Number@

Result: Report displays student number referenced in the Parent table of a table group.

Modifier	Description
Parent	References a data object that is associated with a parent table in a table group. The data object does not need to exist in the parent table, it simply needs to be usable with that table. For example, you are creating a student schedule, and the table group for the schedule has three tables, each created using the key element group Student (top level), School_Enrollments (middle level) and Class_Enrollments (bottom level). You want to add the students' last name to the School_Enrollments table.

Modifier	Description
	<p>However the Last_Name data object is a child of Student, not School_Enrollments. Drag and drop the Last_Name data object into a cell in the School_Enrollments table and enter Parent. in front of the object (@Parent.Last_Name@).</p> <p>To add Last_Name to the Class_Enrollments table, enter two Parent modifiers (@Parent.Parent.Contact.Last_Name@, or @Parent.Parent.Personal_Info.Last_Name@) since the table being referenced is two levels above Class_Enrollments.</p> <p>In most cases, ReportWorks will automatically add the Parent modifier if needed.</p>

Mathematical Modifiers

Format: @[number or Data Object][modifier][number or Data Object]@

Example: @100/10@

Result: Report displays 10.

Example: @Student_ID*10@

Result: Report displays results of the calculated value.

Modifier	Description
*	Multiply value
/	Divide value
%	Calculate percentage of multiplied value
+	Calculate simple addition value
-	Calculate simple subtraction value

String Modifiers

Format: @[modifier].([Data Object].[parameters]})@

Example: @startsWith.(Zip,"940")@

Result: Report displays zip codes that begin with 940

Modifier	Description
startsWith	Provides the starting parameters of the specified data object
endsWith	Provides the ending parameters of the specified data object
substring	Provides the subset of a given string

Work with Tables

The table structure produces a list of rows. The row values are established by placing data objects and other elements within the cells. Tables contain the following parts:

Table Structure

The table structure provides a basic area in which to build the report layout by placing data objects and other elements. The template contains the following parts:

- Table Body - The light gray region of the structure represents the space the table will cover on the layout.
- Table Group Browser - This button appears when table groups have been created. When the Inspector panel is open, click Table Group to view the Table Group Inspector and switch between various tables in the group.
- Table Row - By default, the table structure has a single table row labeled [Data Set or Data Object] Details. You can have Header, Detail, and Summary rows for each grouping within the table. Table rows can be structured (allowing text fields only) or unstructured (allowing multiple text fields, images, and text format manipulation).
- Table Row Column - Columns display in a structured table row. Add data objects to columns and resize columns for an organized report layout.
- Table Row Resize Bar/Row Label - Click on the dark gray row title bar and drag up or down to resize the row. Click on this bar to open the Table Row Inspector. The row label identifies the data set or data object grouping and what grouping part (Header/Details/Summary) the row represents.
- Table Row Structured/Unstructured Selector - Click to change the row from structured (column) format to unstructured.
- Table Row Version - Click **Standard** to view a pop-up menu that provides different formatting for the table row, such as alternating row colors or reprinting a row on each page of the report. The available selections are:
 - Add FirstOnly - Format a row that appears only as the first row in that group or table group.
 - Add Reprint - Format a row that is reprinted when a group or table group is split across a page.
 - Add Alternate - Format alternate rows.
 - Add TopN Others - Format a row that identifies data that is defined through the TopN sorting parameters.
 - Add Split Header - Format a row that is reprinted when an individual row is split due to excessive height.
 - Add Mouse Over - Not enabled.
 - Custom - Format a customized row.

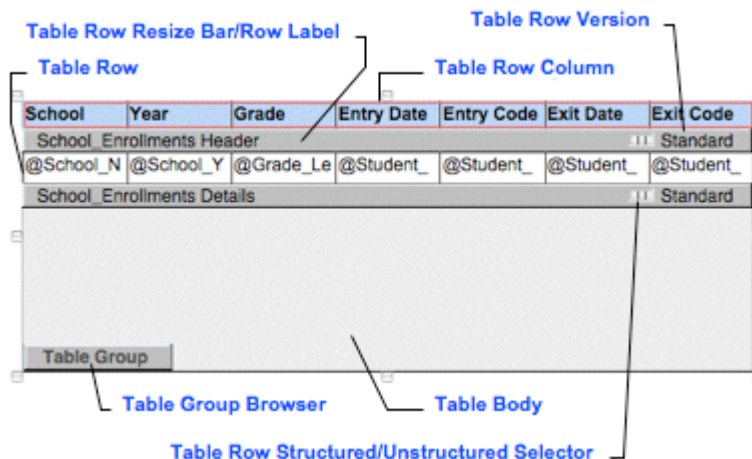


Table Inspector

The Table inspector panels provide access to different parts of the table in order to define data object expressions, format rows, sort, and more. The Table inspector allows you to define the parameters of the primary, or parent, table and navigate to different table groups. The Table inspector changes to Table Row inspector or Table Group inspector depending on what is selected on the table as it appears in the Layout window.

Groups versus Table Groups

When you work with grouping information in a table, you can create a simple group on a single table, or create table groups that link multiple tables together.

Groups in a table insert an additional row to the table. This allows you to display information based on how you group data objects in a table. This is typically used for data objects in a one-to-one relationship in the database. For example, on a Student table, you can group Demographics information, such as gender or ethnicity code.

Table groups allow you to group objects with a one-to-many relationship. For example, on a Student table, you can create table groups for school enrollment and class enrollment. Use the Table Group Inspector to define specific options for the table groups you create.

Work with the Inspector Panels

On the Layout window, there are several different inspector panels available to assist in designing a report. These panels provide access to different elements you place on the report layout, including tables, text, graphics and query expressions.

Note: The Animation Inspector allows you to create short animations for mouse-over features and other graphic elements that appear on Flash based reports. These functions do not work in published reports at this time, as they are not supported within PDF documents.

Inspector Structure

Click the Inspector (blue **i**) icon on the Layout window to open the inspector panel.

Navigation Bar

At the top of each inspector panel is the selection path or navigation bar. Icons display which part of the layout is currently active and which inspector you are currently using. As you select different elements on the report layout, the inspector changes to that specific inspector (such as Table, Table Row, or Text). You can also click on the icons in the Navigation bar to view the different inspector panels.

Inspector Mode

The second row of icons at the top of the inspector panel is the inspector mode. These icons represent the specific type of attributes to edit. The first icon displays the current inspector panel. The remaining icons correspond to different inspector panels to change colors, placement, and size of text or graphics on the layout, or add animation.

Report Layout

Add a table to the report layout to organize data objects and other elements.

How to Add a Table to the Report Layout

1. On the Layout window, click and drag a key element group (such as Student or School Enrollments) from the Data Set panel to the Layout window. The Dataset Key Element dialog appears.
2. Select **Table** and then click **OK**. The table structure appears on the Layout window. Four columns are provided by default.
3. Drag the table structure to the desired position on the Layout window.
4. Click and drag the resize boxes located on the perimeter of the table structure to change the size of the table.
5. Drag and drop data objects from the Data Set panel into the table columns.
6. Select the table structure and click the Inspector icon. The Table Inspector appears.
7. Drag and drop the data object or objects on which you would like to sort the report to the Sorting list box.
8. Select the **Header** checkbox. The Header row appears on the table.
9. Click in a column in the header row to enter header information (such as a column title). Use the Tab key to move to the next column. Alternately, use the Structured/Unstructured selector to remove the columns from the header row to add a longer title or an image.

Note that the Table Inspector has now changed to the Text Inspector.

10. Format the text in the table. For more information, see Format Report Layout Text.
11. On the Inspector navigation bar, click the **Table Inspector** icon. The Table Inspector appears. Alternately, click on the table body to view the Table Inspector.
12. To add summary data on the report (such as a count of the number of rows on the report), select the **Summary** checkbox. The Summary row appears on the table template. Drag data objects to this row and add aggregate modifiers to the objects to produce summary values.

13. Click **Preview**. The records based on the data set, selected boundaries and runtime controls appear. If the sample data displays on multiple pages, click on the arrows at the bottom of the page to navigate to a different page.
14. Click **Edit** to return to the Layout window in edit mode.
15. Make any other necessary format or editing changes.
16. When the report layout is complete, click the **Publish** tab.

Note: Layout changes are automatically saved when a different tab is selected.

Group Data in a Table

Adding a group to a table allows you to separate lists of data objects into groups by different attributes. Group lists can only be created with Data Objects that have a one-to-one relationship. When you create a group list, you can assign a header and summary row to the list.

You must first create a primary table on the Layout window to add a table group. For more information, see [Add a Table to the Report Layout](#).

How to Group Data in a Table

1. On the Layout tab, select the Parent table, then click on the Inspector icon. The Table Inspector appears.
2. On the Data Set panel, drag and drop a Data Object onto the Grouping field on the Table Inspector. The [Data Object] Details row appears on the Layout window.
3. Select the Data Object in the **Grouping** field on the Table Inspector. Right-click on the object and select Move Up or Move Down to change where the row appears on the table.
4. Select the Header and/or Summary checkboxes to add these rows to the group.
5. Click the page break icon to the right of the Data Object in the Grouping field to add a page break after the group in the layout.
6. Add further groups as needed.
7. Format the table row or text as needed. For more information, see [Format Report Layout Text](#) and [Format Table Rows](#).
8. Click **Preview** to view the layout.

Sort Data in a Table

Set the sort order for data objects in a table.

How to Sort Data in a Table

1. On the Layout tab, select the applicable table, and then click the Inspector icon. The Table Inspector appears.
2. Click **Sort**.

Note: Additional sort options include TopN and Value. See the Sorting section of the Table Inspector field definition table for more information.

3. On the Data Set panel, drag and drop the Data Object on which you want to sort onto the Table Inspector's Sorting field.
4. Click the ascending/descending icon to the right of the Data Object to set the sort order. The icon changes to display the selected order.
5. Click **Preview** to view the results.

Create a Group of Tables

Use the table group function to link several tables together, which allows you to include multiple rows of different types of data in the same space as a single table. Table groups have a hierarchical relationship. The primary, or Parent, is the table that was first created (such as Student). Additional table groups, or "child" tables, relate back to the primary table (such as School_Enrollments).

How to Create a Group of Tables

1. On the Layout tab, select the Parent table, then click on the Inspector icon. The Table Inspector appears.
2. Click **Make TableGroup**. The Table Group Inspector appears.
3. Drag and drop a key element from the Data Set panel into the Table Group Inspector. A new table appears on the layout page with that data object association, and the table appears in the Table Group Inspector as a child of the Parent table.
4. Add further table groups as needed. Use the Table Group pop-up menu to move or delete the table.
5. Click on a table group to edit the table elements on the Layout window. When you click on a group, the corresponding table appears in the Layout window.
6. When the report layout is complete, click the **Publish** tab.

Add a Cross Tab Table to the Report Layout

A cross tab table displays summaries of a cross section of data.

How to Add a Cross Tab Table to the Report Layout

1. On the Layout tab, click and drag a data set key element from the Data Set panel to the Layout window. The Dataset Key Element dialog appears.
2. Select **CrossTab** and then click **OK**. The CrossTab structure appears on the Layout window. By default, one column heading, one row heading, and one table cell appear.
3. Drag the structure to the desired position on the Layout window.
4. Click and drag the resize boxes located on the perimeter of the table to change the size.

5. Drag and drop Data Objects from the Data Set panel into the column and row headings (shaded cells the structure). Adding an object to a heading groups the records by that object. In the rendered report, additional heading are added, one for each group value.
6. Use an aggregate modifier such as @count@, or a data object and a modifier, such as @total.[data object]@, to specify the data that displays in the table body.
7. Select the border of the CrossTab template, and then click the Inspector icon. The CrossTab Inspector appears.
8. Click **Auto Format** to select a pre-defined format for the table.
9. Select the applicable options for the table.
10. To add more rows and columns to the table, click in one of the cells in the template. The Simple Table Inspector appears.
11. Select the applicable number of rows and/or columns.
12. Format the text in the table. For more information, see Format Report Layout Text.
13. Click **Preview**. The records based on the data set, selected boundaries and runtime controls appear. If the sample data displays on multiple pages, click on the arrows at the bottom of the page to navigate to a different page.
14. Click **Edit** to return to the Layout window in edit mode.
15. Make any other necessary format or editing changes.

Note: A small "G" appears in the upper-right corner of heading cells that produce groups of data. Once a grouping is established, it can only be changed by right-clicking on the applicable cell and selecting **Clear Contents** from the pop-up menu. Then a new data object can be dragged into the cell. Deleting the cell contents manually will not remove the grouping relationship to the previously used data object.

16. When the report layout is complete, click the **Publish** tab.

Note: Layout changes are automatically saved when a different tab is selected.

Create Labels

Use a combination of Data Objects, static text, and even graphic images to create customized labels.

How to Create Labels

1. On the Layout tab, click and drag a data set key element from the Data Set panel to the Layout window. The Dataset Key Element dialog appears.
2. Select **Labels** and then click **OK**. The label template appears on the Layout window.
3. Click on the border of the label template, and then click the Inspector icon. The Labels Inspector appears.
4. Select the label product number from the pop-up menu, or select Custom and enter the applicable dimensions in the available fields.
5. Drag and drop a Data Object from the Data Set panel to the Sorting fields in order to determine the sort parameters. For more information, see the Sorting section of the Table Inspector field definition table.

6. Add any applicable static text or graphic images. For more information, see Format Report Layout Text and Add Images to the Report Layout.
7. Click **Preview**. The records based on the data set, selected boundaries and runtime controls appear. If the sample data displays on multiple pages, click on the arrows at the bottom of the page to navigate to a different page.
8. Click **Edit** to return to the Layout window in edit mode.
9. Make any other necessary format or editing changes.
10. When the report layout is complete, click the **Publish** tab.

Note: Layout changes are automatically saved when a different tab is selected.

Add a Graph to the Report Layout

Add a graph to the report layout to display bar graphs and pie charts.

How to Add a Graph to the Report Layout

1. On the Layout tab, click and drag a data set key element from the Data Set panel to the Layout window. The Dataset Key Element dialog appears.
2. Select **Graph** and then click **OK**. The graph structure appears on the Layout window.
3. Drag the graph structure to the desired position on the Layout window.
4. Click and drag the resize boxes located on the perimeter of the structure to change the size of the graph.
5. Click on the border of the graph structure, and then click the Inspector icon. The Graph Inspector appears.
6. Click the **Series** tab.
7. Drag and drop a data object from the Data Set panel to the **Grouping** field. This determines the bars/pie pieces on the chart.

Note: It is not necessary to enter @ symbols when adding data objects or modifiers in the Grouping or Keys fields on the Graph Inspector.
8. In the **Keys** field, enter a modifier or a data object with a modifier. This determines the number associated with each bar/pie piece.
9. Click on a chart type icon to select the type of chart for the report.
10. Click **Edit** next to the Show Legend checkbox (the checkbox is selected by default). The Text Inspector appears.
11. Delete the default text (Legend) and drag and drop a Data Object from the Data Set panel to the highlighted area of the Legend panel on the Layout window.
12. To add labels to the graph, select the **Show Bar/Wedge Labels** checkbox. The Graph Bar Label Inspector appears. See the Show Bar/Wedge Labels section of the Graph Inspector field definition table for further information.
13. Edit the colors on the graph if applicable.
14. Select the desired 3D effects.
15. Add a report title or other text to the layout. for more information, see Format Report Layout Text.

16. Click **Preview**. The records based on the data set, selected boundaries and runtime controls appear. If the sample data displays on multiple pages, click on the arrows at the bottom of the page to navigate to a different page.
17. Click **Edit** to return to the Layout window in edit mode.
18. Make any other necessary format or editing changes.
19. When the report layout is complete, click the **Publish** tab.

Note: Layout changes are automatically saved when a different tab is selected.

Format Table Rows

You can apply formatting to different table rows and the text or data objects contained in those rows.

How to Format Table Rows

1. On the Layout window, double click on a table row label.
2. Click the Inspector icon. The Table Row Inspector appears.
3. Change any attributes associated with the row.
4. To format text and/or background colors, see Format Report Layout Text.
5. To highlight alternate rows on the table with a different color, click **Standard**.
6. Select **Add Alternate** from the pop-up menu. Alternate now appears on the [data set] Details row, signifying that you are working with the alternate version of the row.
7. On the Table Row Inspector, click the paint can button. The Paint/Fill Inspector appears.
8. Select the **Fill** checkbox.
9. Select **Color Fill** from the pop-up menu.
10. Click the color box in the center of the inspector. The Color Panel appears.
11. Select a color on the Color Panel. The color appears in the Alternate row.
12. Click **Preview**. The first 20 records based on the data set and selected boundaries appear. If the sample data displays on multiple pages, click on the arrows at the bottom of the page to navigate to a different page.
13. Click **Edit** to return to the Layout window in edit mode.
14. Make any other necessary format changes.
15. When the report layout is complete, click the **Publish** tab.

Format Report Layout Text

Change the appearance of the text on the report layout.

Note: For more information on adding text to a report layout, see the section Drawing Toolbar on the Layout Window field definition table.

How to Format Report Layout Text

1. On an existing report layout, click on the data object or text to format.
Note: When working with a table, select text in an individual cell, or click on the row to format all data objects in the row simultaneously.
2. On the menu bar, click **Tools > Font Panel**. The Font panel appears.
Alternately, you can click the **A** icon to open the Font Panel.
3. Select the font from the Family list.
4. Select the text size from the Sizes list.
5. Select the style format (**B**=bold, **I**=italic, **U**=underline, **O**=outline).
6. On the Font Panel, click **Color**. The Color Panel appears.
7. If working with a table, click on a row and select a background color for the row. If working with an individual data object, select a background color for the object.
8. Using the cursor, highlight the data object text.
9. Select a text color on the Color Panel.
10. Click on text and use the **Text Inspector** to edit the alignment and other formatting characteristics.
11. Click **Preview** to view a sample of the report.
12. Click **Edit** to return to the Layout window in edit mode.

Add Images to the Report Layout

Drag and drop images from any directory on to the report layout.

How to Add an Image to the Report Layout

1. On the Layout window, add the applicable data objects to a data structure, such as a table structure.
2. Locate an image file on your local system or network, then drag and drop it onto the report layout.
3. Click on the resize boxes on the image to adjust the size of the image.
4. Click the Inspector icon. The Image Tool Inspector appears. Select the appropriate attributes for the image.
5. Click the paint can icon on the inspector. The Paint/Fill Inspector appears. Select the appropriate attributes for the image.
6. Use the drawing toolbar to add any graphic elements such as boxes or other shapes. Use the Paint/Fill Inspector to change different attributes of the graphic element.
7. Click **Preview** to view a sample of the report output.

Resize Report Layout Elements

Resize different elements on the report layout. These elements include tables, table columns, graphics, or any individual element on the layout.

How to Resize Report Layout Elements

1. On an existing report layout, click on the element to resize.
2. Click on the borders of a table, graphic, or text box, then select a corner and drag the pointer to resize.
3. Click **Preview** to view the design results.
4. Click **Save**.

Report Layout Page Setup

Use the Document Inspector to setup the page options for the report layout.

How to Setup the Report Layout Page

1. On an existing report layout, or on a new layout, click the Inspector icon. The Inspector panel appears.
2. Click on the first icon in the Navigation bar. The Document Inspector appears.
3. Make the applicable selections in the provided fields. For more information, see the Document Inspector field description table.

Note: Layout changes are automatically saved when a different tab is selected.

Publish Reports

About Publishing Reports

Publishing the report to the SIS is the last step in the report creation process.

Report developers specify the publication methods for a report. Report administrators create categories within the SIS that the report developers reference in ReportWorks to organize the reports for report generators.

Publish Reports to the SIS

When the report design is complete, publish the report to the SIS.

Note: You must have the report layout saved before completing this procedure. For more information, see About Report Layout.

How to Publish Reports

1. Click the **Publish** tab. The Publish window appears.
2. Enter a title in the **Report Name** field.
3. Enter a brief description of the report in the **Report Description** field.

Note: This information displays in the SIS and is viewable by the report generator.
4. Select the applicable **Application** and **Category** from the pop-up menus.
5. Select an **Output Type** from the pop-up menu. The initial release of ReportWorks allows for PDF output.
6. Select the applicable school or schools on the Unpublished Schools list.
7. Click the **right arrow (>)** to move the select school or schools to the Published Schools list. Security Roles for the selected school or schools appears.
8. Select the applicable security roles/groups on the **Unpublished Security Roles/Groups** list.
9. Click the **right arrow (>)** to move the select school or schools to the **Published Security Roles/Groups** list.
10. Click **Publish**. The Publish window displays the updated information and the report appears in the selected SIS application.

Unpublish Reports from the SIS

Remove outdated or incorrect reports from the SIS.

How to Unpublish Reports

1. Load a report project. For more information, see Open an Existing Project.

2. Click the **Publish** tab. The Publish window displays the report information.
3. Click **Unpublish**. The Publish window displays the updated information and the report is removed from the selected application.

Update Published Reports

When a report developer changes an existing project that is already published, the report must be unpublished and re-published in order for the updated information to appear on the report in the SIS.

How to Update Published Reports

1. Open an existing project. For more information, see Open and Existing Project.
2. Make any applicable changes to the project.
3. Click the **Publish** tab. The Publish window displays the report information.
4. Click **Unpublish**. The report is removed from the selected application.
5. Select the applicable schools and security roles/groups for the report. For more information, see Publish Reports to the SIS.
6. Click **Publish**. The Publish window displays the updated information and the report is updated in the selected application.

Export and Import Report Projects

About Importing and Exporting

Report developers can share projects outside of the ReportWorks application using the Import and Export functions.

Report projects are exported as a single file with the extension `.rwp` (ReportWorks project), and contain all project contents, settings and metadata, except for publishing information.

Report projects can be imported as well. The report developer performing the import operation is established as the owner of the imported project.

Export a Project

Export a report from ReportWorks. The exported report format is `.rwp` (ReportWorks project).

How to Export a Project

1. Open an existing project. For more information, see [Open an Existing Project](#).
2. On the ReportWorks File menu, select **Export Current Project**. The Export dialog appears.
3. Select the target folder and volume for the report project.
4. Click **Export**. The report project appears in the specified location.

Import a Project

Import a project into ReportWorks.

How to Import a Project

1. On the File menu, select **Import Project**. The Import dialog appears.
2. Select the report project from the target location list.
3. Click **Import**. The report project appears in the Project pane.
4. Double-click the report project name to load the report project.

Appendix: Field Description Tables

Data Set Panel

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Data Set Selection	Displays the name of the selected data set.
Key Element Group	<p>A small icon to the left of the name identifies a key element group. Key element groups can be used to create a data structures such as a table, graph, or labels.</p> <p>Click the arrow to the right of a data object group to expand the list of available data objects.</p> <p>Data objects that appear shaded cannot have filters or runtime controls assigned to them.</p>
Resize Bar	<p>Click and drag on the Data Set bar to resize the panel vertically.</p> <p>Click the minimize button to minimize the panel. Click the button again to display the panel to the default size.</p>

Document Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Selection Path	Click Document icon.
Paper Size	Select the paper size from the pop-up menu.
Units	Select the measurement units from the pop-up menu.
Orientation	Select the paper orientation.
Margins	<p>Enter margin measurements in the available fields.</p> <ul style="list-style-type: none"> Click Show to display margins on the report layout page. Click Snap to automatically align text, graphics, and other objects to the margins as you place them on the page.
Grid	Enter grid measurements in the available fields.

Field	Description
	<ul style="list-style-type: none"> Click Show to display a grid on the report layout page. Click Snap to automatically align text, graphics, and other objects to the grid as you place them on the page. In the text field, enter a measurement for the background grid. Increase the number to make the grid larger, or decrease the number to make the grid smaller.
Page Layout	Select a page layout option.
String for Null	Enter text to display on the report when a zero value is returned.
Advanced	Choose the applicable settings for the report: <ul style="list-style-type: none"> Paginate Compress Calibrate Colors Proximity Guide

General Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Property Expressions	<p>Property Expressions are used to dynamically manipulate the properties of any item in the layout, including data objects, shapes, images, and text, based on the result of a formula or condition.</p> <ol style="list-style-type: none"> Select an object, shape, image, or text in the Layout window. Click the Inspector icon, then click the General Inspector icon on the navigation bar. Click on an item in the Property Expressions list: <ul style="list-style-type: none"> Url – Converts the object into a hyperlink that connects to the specified URL. The URL can include a data object. For example, <code>http://domain.com/info.jsp?type="Student":"ID"=[student_number]</code> will create a hyperlink to domain.com folder IsVisible – Displays the object only if the specified condition is met. For example, <code>[grade_level]=10</code> will only display the item if the value returned by the grade_level data object is 10.

Field	Description
	<ul style="list-style-type: none"> • Font – Displays text or data object in a different font based on a condition. Font size and the attributes bold and italic can be used as well. For example, [numeric data object]>100?"Arial" or last_name=="Smith"?"Verdana bold 14":"Verdana italic 20" • FontColor – Display text or a data object in a different font color. For example, first_name=="Joe"?"red" will set the font color for the item to red if the value returned by first_name is "Joe" and to null (interpreted as no color change) if false. In addition to using color names ("blue, green, red, yellow, etc.), colors can be specified using HTML hexadecimal notation (#FFA8C2). The hexadecimal value of a color can be easily obtained using the RGB sliders in the color panel. • FillColor – Fills the selected item with a color based on a condition. For example, [data object 1]!= [data object 2]?"green":"blue" will set the fill color of the item to green if the two data object values are not identical and will set the fill color to blue if they are identical. • StrokeColor – Changes the outline color of the selected item based on a condition. For example, last_name=="Smith"?"red":"blue" will change the item's outline color to red if the value of last_name is "Smith" and blue if not "Smith." • X – Positions the element vertically based on a formula. For example, [numeric data object]+10 would set the X position for the selected item to the value of the numeric data object plus 10. • Y – Positions the element horizontally based on a formula. For example, [numeric data object]-10 would set the Y position for the selected item to the value of the numeric data object minus 10. • Width – Expands or contracts the width of the element based on a formula or condition. For example, [numeric data object] sets the width of the item based on the value of the numeric data object, and [numeric data object]>14?20:40 would set the width to 20 if the value returned by the data object was greater than 20 and to 40 if the value was less than or equal to 14. • Height – Expands or contracts the height of the element based on a formula or a condition. For example, [numeric data object] + [numeric data object] would set the height of an item based on the sum of the two numeric data objects, and [last_name]=="Smith"?100 would set the height to 100 if the value returned by last_name was "Smith." <p>4. Enter the expression or value in the large text box</p>

Field	Description
	<p>below the list of properties, then press Enter to store the value.</p> <p>Note: The following are the defined colors to be used in the Property Expressions. Use lower case (as displayed in the following list) or all caps when building the expression:</p> <ul style="list-style-type: none"> • black • blue • cyan • darkGray • gray • green • lightGray • magenta • orange • pink • red • white • yellow
Object Causes Wrap	Select the checkbox to wrap text around the selected element.
Wrap to Square Border	Select the checkbox to wrap text around all sides of the square bounding box for the selected item.

Graph Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Graph Tab

Field	Description
Chart Type Selector	<p>Click the icons to select the graph type:</p> <ul style="list-style-type: none"> • Vertical Bar Chart • Horizontal Bar Chart • Pie Chart
Show Legend	<p>Select the checkbox to display the graph legend.</p> <p>Click Edit to display the Text Inspector. Enter text in the field, or drag and drop a Data Object into the Legend panel on the graph template.</p>
Show Bar/Wedge Labels	<p>Select the checkbox to display the Graph Bar Label Inspector.</p> <ol style="list-style-type: none"> 1. When selected, a text box appears on the graph

Field	Description
	<p>template.</p> <ol style="list-style-type: none"> Double-click on the text in the text box. The Text Inspector appears. Enter a data object modifier in the text field (such as @count@ or @total@).
Colors	Use the Color Panel to select or change colors in the graph.
Draw 3D	<p>Select the checkbox to add or remove 3D effects on the graph.</p> <ol style="list-style-type: none"> Click and rotate the trackball icon to change the perspective of the graph. Click and drag the outer edge of the trackball icon to rotate the graph. Click Edit to display the Graph Content Inspector. Adjust the 3D settings as applicable.

Series Tab

Field	Description
Dataset Key	List the key element group you selected for the graph.
Filter Expr:	Enter an expression using data object modifiers, if applicable.
Grouping	<p>Grouping determines the number of bars or pie slices in a graph. For example, if you select Ethnicity, there will be one bar for each ethnicity code.</p> <p>Drag and drop a data object from the Data Set panel to the text field.</p>
Keys	<p>Denotes how the bar values are calculated.</p> <p>Enter an aggregate data object modified in the field such as "count". You can also combine aggregate modifiers with a data object to calculate totals or averages for that object.</p> <p>Note: The Keys pop-up menu is not enabled.</p>
Sorting	Drag and drop a data object on which to sort the graph. For more information, see Sort Data in a Table.

Advanced Tab

Field	Description
Draw Axis Labels	Select the checkbox to display axis labels.
Draw Major Axis	Select the checkbox to display lines that represent the major axis.

Field	Description
Draw Minor Axis	Select the checkbox to display lines that represent the minor axis.
Draw Series Separator	Select the checkbox to display a series separator.
Stack Series	Select the checkbox to stack the bars on the graph.
Bar Width	Enter a value for the width of the bars on the graph.
Bar Spacing	Enter a value for the spacing of the bars on the graph.
Axis Min, Max, Count	Default is (Automatic)
Draw Wedge Label Lines	Select the checkbox to display lines for the wedge label.
Extrude Wedges	Select an option from the pop-up menu. This determines how the pie slices are separated or "pop out" on the chart.

Image Tool Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Keys	Not Enabled
Page	Not Enabled
Margins	Enter a value to increase or decrease the area of space between the bounding box and the image.
Style	Select the image style from the pop-up menu: <ul style="list-style-type: none"> • Stretch • Tile • Fit • Fit if Needed
Rounding Radius	Click and drag the wheel to the right or left to increase or decrease the rounding of the border surrounding the image. Note: You can increase this value to create an oval or round shape for the image, then use the Offset options on the Paint/Fill Inspector to center the image in the shape.
Save	Click to save the image to your computer.
Convert to Jpeg	Click to convert the image to a JPEG.

Inspector Panel

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Navigation Bar	<p>The first row of icons at the top of the Inspector Panel. The Inspector Panel changes based on what you select on the page. Click on an icon to access the specific Inspector for editing that element:</p> <ul style="list-style-type: none"> • Document Inspector • General Inspector • Graph Inspector • Image Tool Inspector • Page Inspector • Paint/Fill Inspector • Placement Inspector • Table Inspector • Table Group Inspector • Table Row Inspector • Text Inspector
Mode Buttons	<p>Click to open a specific attribute inspector panel. The first button corresponds to the element or table selection on the page:</p> <ul style="list-style-type: none"> • [Selection] Inspector • Paint/Fill Inspector • Placement Inspector • General Inspector • Animation Inspector

Layout Window

The following tables describe the fields that are visible on this dialog when performing certain functions.

Field	Description
Preview	Select to toggle between Preview and Edit modes.
Drawing Toolbar	<p>Click on a tool to select, create or edit shapes. Once selected, click and drag the cursor on the page to create the shape that is represented on the tool bar.</p> <p>Click the text tool then drag the cursor on the page to create a</p>

Field	Description
	<p>text box. Type text in the box.</p> <p>The following options are available on the toolbar:</p> <ul style="list-style-type: none"> • Select - Click to select a drawing element or text box on the page. • Line - Click to create a line. • Rectangle - Click to create a rectangle. • Circle - Click to create a circle. • Text - Click to create a text box and enter text. • Polygon - Click to join points with straight lines. Alternatively, you can click on a point, then drag the line to position line segments to a specific area. • Star - Click to create a star. • Pencil - Click to draw free-hand lines.
Inspector Panel	Click the blue "i" icon to open the Inspector Panel for the element that is currently selected. See Inspector Panel for more information.
Color Panel	Click the color wheel to open the Color Panel.
Font Panel	Click the A icon to open the Font Panel.
Page Resize	Use the pop-up menu to zoom in or zoom out of the page view.
Page Scrolling	Use the arrow buttons to scroll through multiple pages of a report layout.

The following tables describe the main menu items on the Layout tab.

Menu	Description
Edit	<p>Use the pop-up menu to select one of the following commands:</p> <ul style="list-style-type: none"> • Undo • Redo • Cut • Copy • Paste • Select All
Format	<p>Use the pop-up menu to select one of the following commands:</p> <ul style="list-style-type: none"> • Font Panel • Bold

Menu	Description
	<ul style="list-style-type: none"> • Italic • Underline • Outline • Align Left • Align Center • Align Right • Superscript • Subscript
Pages	<p>Use the pop-up menu to select one of the following commands:</p> <ul style="list-style-type: none"> • Add Page • Add Page Previous • Remove Page • Zoom In • Zoom Out • Zoom 100% • Zoom 200% • Zoom Toggle Last • Zoom
Shapes	<p>Use the pop-up menu to select one of the following commands:</p> <ul style="list-style-type: none"> • Group • Ungroup • Bring to Front • Send to Back • Make Row Top • Make Row Center • Make Row Bottom • Make Column Left • Make Column Center • Make Column Right • Make Same Size • Make Same Width • Make Same Height • Equally Space Row

Menu	Description
	<ul style="list-style-type: none"> • Equally Space Column • Group in Switch Shape • Group in 3D Shape • Move to New Layer • Combine Paths • Subtract Paths • Convert to Image
Tools	<p>Use the pop-up menu to select one of the following commands:</p> <ul style="list-style-type: none"> • Inspector • Color Panel • Font Panel • Toggle Rulers
Help	Click Contents to open the ReportWorks help.

Page Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Layers	<p>The box displays all of the current layers on the page.</p> <ul style="list-style-type: none"> • Click the eye icon to display all layers on the report layout page. • Click the shaded eye icon to hid all layers on the report layout page. • Click the lock icon to lock all elements on all layers. <p>Note: To show, hid, or lock individual layers, click the icon next to the layer name in the available list.</p>
Add	Click to add a layer to the report layout page.
Remove	Click to remove the selected layer from the report layout page.
Rename	Click to rename the selected layer.
Merge	Click to merge a selected layer with the layer immediately preceding it.

Paint/Fill Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Fill Tab

Field	Description
Fill	Select the checkbox to fill <ul style="list-style-type: none"> • Color Fill • Gradient Fill • Image Fill
Style	Select the option from the pop-up menu: <ul style="list-style-type: none"> • Stretch • Tile • Fit • Fit if Needed
Location/Size Selectors	Enter the size and location of the image in exact values, or use the arrow buttons to select a value. <ul style="list-style-type: none"> • Offset • Rotation • Scale
Transparency	Use the slide bar to determine the transparency value of the image, or enter a value in the text field.

Stroke Tab

Field	Description
Stroke	Select the checkbox to <ul style="list-style-type: none"> • Select a border type from the pop-up menu. • Click on the color box to select a border color from the Color Panel.
Width	Click and drag the wheel to the right or left to increase or decrease the border size, or enter a value in the text field.
Transparency	Use the slide bar to determine the transparency value of the border, or enter a value in the text field.

Shadow Tab

Field	Description
Shadow	Select the checkbox to <ul style="list-style-type: none"> Click on the color box to select a shadow color from the Color Panel.
Softness	Use the slide bar to determine the softness value of the image, or enter a value in the text field.
Location/Size Selectors	Enter the size and location of the image in exact values, or use the arrow buttons to select a value.
Transparency	Use the slide bar to determine the transparency value of the shadow, or enter a value in the text field.

Placement Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Location/Size	Click and drag the available wheels to change the position of a selected element on the report page.
Roll/Scale	Click and drag the available wheels to change the scale, rotation, or to skew the selected element.

Project Details Window

The following tables describe the fields that are visible on this dialog when performing certain functions.

Field	Description
Report Name	Name assigned to the report project.
Project Description	Description of the report project.
Publish State	Displays if the project is published or unpublished.
Data Set	Select the applicable data set from the pop-up menu.

Projects Pane

The following tables describe the fields that are visible on this pane when performing certain functions.

Field/Button	Description
Add (+)	<p>Click to open the pop-up menu:</p> <p>Note: Different combinations of these menu options are available when a folder or report is selected.</p> <ul style="list-style-type: none"> • Select Add Sub Folder to Root to create a folder in the root directory. • Select Add Report to Root to add a report to the root directory.
Delete (-)	Select a folder or report project, and click to delete.
Folder right-click menu	<p>Right-click (or press CTRL+click) on a folder to open the pop-up menu:</p> <ul style="list-style-type: none"> • Select Add Report to create a report in the selected folder. • Select Rename Folder to change the folder name. • Select Delete Folder to remove the folder and it's contents.
Report right-click menu	<p>Right-click (or press CTRL+click) on a report to open the pop-up menu:</p> <ul style="list-style-type: none"> • Select Rename Report to change the report name. • Select Delete Report to remove the report. • Select Load Report to open the report.

Publish Reports Window

The following tables describe the fields that are visible on this dialog when performing certain functions.

Field	Description
Project Name	The name assigned when the report was created.
Project Description	The description assigned when the report was created.
Publish State	Denotes if the report is Published or Not Published to the SIS.
Published By	Displays the user who published the report.
Published Date	Displays the date and time the report was published.
Report Name	Enter the name to display when the report is published to the SIS.
Report Description	Enter the description to display when the report is published to the SIS.

Field	Description
Output Type	Select the output type from the pop-up menu. Note: PDF is the default output type.
Application	Select the SIS from the pop-up menu.
Category	Select the reporting category from the pop-up menu. Note: Categories are created in the SIS application. When new categories are added, this list is updated dynamically and the list is refreshed each time the Publish window is accessed.
School(s)	Select the school or schools to which the report will be published. Select a school name, then click the arrow to move it to the Published Schools list. Remove schools from the Published list by selecting the school, then clicking the arrow to move it to the Unpublished Schools list. Note: Press and hold SHIFT or CTRL to select multiple schools, or CTRL+A to select all schools in the list.
Security Roles	Security roles associated with the selected Published Schools appear. Select the applicable security roles for the report generator. Select a role, then click the arrow to move it to the Published Security Roles list. Remove roles from the Published list by selecting the role then clicking the arrow to move it to the Unpublished Security Roles list. Note: Press and hold SHIFT or CTRL to select multiple roles, or CTRL+A to select all schools in the list.
Publish	Click to publish the report with the selected options to the SIS..
Unpublish	Click to remove a previously published report from the SIS.

ReportWorks Launch Screen

The following tables describe the fields that are visible on this screen when performing certain functions.

Field/Button	Description
Project based on a template	Click this option and the template selection screen appears. The screen displays the template name, the data set on which the template is based, and a brief description of the template. Note: Templates can only be accessed from the launch screen. Select a template from the available list, and then click

Field/Button	Description
	Create. The Project window appears.
Project from scratch	Click this option to create a new project . Enter a report title and description on the next screen that appears. Note: New projects can also be created from the Project pane.
Open an Existing Project	Click the folder to open the existing project selection screen. This screen displays the report project name, the data set on which the project is based, and a brief description of the project Note: Existing projects can also be opened from the Project pane. Select a template from the available list, and then click Open . The Project window appears.
Recent Project List	Recently viewed projects appear on the launch screen. Click on any of the listed projects to open.

Scope Window

The following tables describe the fields that are visible on this dialog when performing certain functions.

Boundaries Mode

Field	Description
Data Set Panel	Displays the selected data set and associated data objects by group. Drag and drop data objects from the Data Set panel onto the Scope window in Boundaries mode to create filters. Note: Data objects that appear shaded cannot be used to create boundary filters.
Add Filter Dialog	Displays when data objects are dropped on the Scope window in Boundaries mode. <ol style="list-style-type: none"> Select the appropriate operator from the pop-up menu to filter the data on the report output: <ul style="list-style-type: none"> = equals like is similar to* > is greater than < is less than ≥ is greater than or equal to ≤ is less than or equal to

Field	Description
	<p><> does not contain</p> <ol style="list-style-type: none"> Enter filter criteria in the field to further define the query. Use commas to separate values if including more than one value in the criteria field. Click OK to enable the filter, or Cancel. <p>As you add filters, they appear on the Scope window in Boundaries mode.</p> <p>For more information, see Filter Examples.</p> <p>*The Like operator is used in conjunction with the "%" wildcard. When % is used before text, any values that end with the text will be included. If % is used after the text, any values that start with the text will be included. If % is used before and after the text, any values containing the text will be included.</p>
Data Object Filter	<p>The data objects that are included in the filter appear in a group.</p> <ul style="list-style-type: none"> Click on a data object. A vertical blue arrow appears, indicating that the object can be moved to a different group. Click the down arrow to move the object to a lower group. Click the up arrow to move the object to a group located above the current group. Click the remove icon (minus sign) to remove the data object filter, or the entire group.
And/Or Button	<p>The And/Or button appears when more than one filter group is created.</p> <ul style="list-style-type: none"> Click And to generate report output that meets all filter conditions listed in the group above and below the And. Click Or to generate report output that meets filter conditions listed in the group above and below the Or.

Runtime Controls Mode

Field	Description
School Context Filtering	Select the applicable school from the pop-up menu.
Sample Size	Select the sample size value from the pop-up menu. The sample size is the number of records to display when Preview is selected on the Layout window.
Selection of Student Grade	Select the checkbox to allow the report generator to select a

Field	Description
Level	grade level or multiple grade levels for the report output.
Use of Current Student Selection	Select the checkbox to allow the report generator to use their current student selection for the report output.
Selection of Class Enrollment Dates	Select the checkbox to allow the report generator to specify class enrollment dates for the report output. Note: This runtime question appears when the Student:Basic+Schedule data set is selected.
Selection of School Enrollment Dates	Select the checkbox to allow the report generator to specify school enrollment dates for the report output.

Table Group Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Table Group	Use the pop-up menu to administer table groups: <ul style="list-style-type: none"> • Select Add Peer Table to add a table at the same level as the default, or parent table. • Select Add Child Table to add a table that relates to the parent table. • Click on a table in the table group field list, then select Remove Table to delete the table.
Key field	Displays the data object group (typically a key element) assigned to the selected table group.
Start on new page	Select the checkbox to start the selected table group on a new page.

Table Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Dataset Key	Displays the selected data object group.
Filter Expr	Enter a filter expression for this table. Note: Filters that are applied to the report on the Data window take precedent over filter expressions entered in this field.

Field	Description
Grouping	Displays the selected table group. <ul style="list-style-type: none"> • Click on the arrow to expand a group. • Click on a group to view the Table Group inspector for that group.
Keys	Not enabled.
Header	<ul style="list-style-type: none"> • Select the checkbox to display the header row on the table. • Deselect the checkbox to remove the header row from the table.
Details	<ul style="list-style-type: none"> • Select the checkbox to display the details row on the table. • Deselect the checkbox to remove the details row from the table.
Summary	<ul style="list-style-type: none"> • Select the checkbox to display the summary row on the table. • Deselect the checkbox to remove the summary row from the table.
Sorting	Click and drag an object from the Data Set panel to create sorting groups. <ul style="list-style-type: none"> • Sort - click to define basic sorting. • TopN - click to define sorting based on a specific object, specific number of results, and whether or not to include results outside of the defined number in the report. • Drag and drop a Data Object in the Key Path field, then enter a value in the Count field. • Select the Include Others checkbox to include results outside of the Count value in the report that are combined into a composite list. • Value - Enter a value other than a Data Object, and then select the Sort checkbox.
Number of Columns	Enter the number of columns for the table.
Inter-column Spacing	Enter the desired spacing between columns.
Make TableGroup	Click to create a table group. Table groups make it possible to have nested child tables, or multiple peer tables that pick up where the previous one leaves off. Any table can have child tables by promoting it to a Table Group.

Field	Description
Paginate	The checkbox determines pagination for the report: <ul style="list-style-type: none"> Select the checkbox to turn pagination is on (default). Deselect the checkbox to turn pagination off for a scrollable report..

Table Row Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Field	Description
Structured - number of columns	Select the checkbox to add or remove columns from this row. Enter the number of rows in the text box.
Sync column widths with row above	Select the checkbox to sync column resizing with the row above the selected row.
Sync column widths with all version	Select the checkbox to sync column resizing with all row versions in the table (such as an Alternate row).
Stay with this number of children	Select the checkbox to enable window/orphan control on the table row. Enter the number of rows you want to bind to the row to eliminate an orphan row in the text box.
Reprint when wrapped	Select the checkbox to reprint the row contents on the next page if the data is not contained on a single page.
Print even if no objects in group	Select the checkbox to print the row even if there are no objects to display in the group.
Move row to bottom of page	Select the checkbox to move the row contents to the bottom of the page.
Min Split Height	Enter the minimum height (in points) you want the row to split across a page. The default setting (72 pts) means that at least an inch of the row is available on the first page.
Min Remainder Height	Enter the minimum remainder height (in points) you want the row to split across a page. The default setting (72 pts) means that at least an inch of the row is available to split to the next page.

Text Inspector

The following tables describe the fields that are visible on this panel when performing certain functions.

Text Tab

Field	Description
Horizontal Alignment	<p>Click the icon to set the horizontal alignment of the text:</p> <ul style="list-style-type: none"> Align Left Align Center Align Right Justify
Vertical Alignment	<p>Click the icon to set the vertical alignment of the text:</p> <ul style="list-style-type: none"> Align Top Align Center Align Bottom
Text Editing Field	<p>Edit text directly in the field.</p> <p>Highlight the text and use the Font panel to change the text size, font and appearance.</p>
Rounding Radius	<p>Click and drag the wheel to the right or left to increase or decrease the rounding of the border surrounding the text.</p>
Overflow Behavior	<p>Select the option for text that overflows a text box or table row:</p> <ul style="list-style-type: none"> Paginate - Select to wrap text to fit in the text box or table row Shrink Text to Fit - Select to reduce the text size to fit in the text box or table row Grow - Select to increase the text size to fit in the text box or table row
Misc. Options	<p>Select the checkbox for miscellaneous text options:</p> <ul style="list-style-type: none"> Always Show Border - Select to display a gray border around text, even when it is not selected. The border does not display on the report output. Coalesce Newlines - Select to use the minimum lines necessary when combining data expressions. Perform Wraparound - Select to wrap text around an object.

Metrics Tab

Field	Description
Character Spacing	<p>Click and drag the wheel to the right or left to increase or decrease the spacing between characters.</p>

Field	Description
Line Spacing	<p>Click and drag the wheel to the right or left to increase or decrease the spacing between lines of text.</p> <ul style="list-style-type: none"> • Click Single for single-line spacing. • Click Double for double-line spacing.
Line Gap	<p>Click and drag the wheel to the right or left to increase or decrease the spacing between wrapped text in a text box or table row.</p>
Line Min	<p>Enter the minimum number of lines included in a text box or table row in the field. Alternately, use the arrows to select a number.</p>
Line Max	<p>Enter the maximum number of lines included in a text box or table row in the field. Alternately, use the arrows to select a number.</p>
Text Actions	<p>Click the arrow to select an option from the pop-up menu:</p> <ul style="list-style-type: none"> • Make Min Width • Make Min Height • Break into Chars • Turn to Path • Create Linked Text

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