

Appendix I: Generating Reports



I.A Accessing Reports

I.B Understanding the Report Screen

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Accessing Reports



Reports are accessed by “clicking” on the Reports Tab from the Main Menu.

You can generate and print pre-formatted reports that feature district data. You can also create custom reports using the “Data Browser” tool.

It is important that districts review the reports as they are creating their LRFP to ensure that all aspects of their plan are appropriately represented. *(See Part F: Creating a LRFP, page F.22, for a list of reports and their use in reviewing a LRFP.)*

Understanding the Report Screen

Report Screen – Detail View

The screenshot shows the 'Existing and Proposed Site and Asset Inventory' report screen. The navigation pane on the left includes categories such as Inventory, Enrollment, and Reports. The main content area is titled 'Existing and Proposed Site and Asset Inventory' and includes sections for 'Selection Criteria' (with a dropdown menu set to 'Proposed LRFP'), 'Report Options' (with checkboxes for 'Cover Page', 'Reset Page Number', and 'Table of Contents'), 'Notes', and 'Footer Notes'. A 'Run Report' button is located in the top right corner. Red dotted arrows point from the text descriptions on the right to the corresponding UI elements.

The illustration to the left shows the **Detail View of a Report Screen**. This screen appears after you “click” on the Report tab from the main menu.

The various components of the Report Screen are as follows:

List of Reports - The list of available pre-formatted Reports appears in the Blue Navigation Pane on the left side of the screen. (See Part F: Creating a LRFP, page F.22, for a list of reports and their use in reviewing a LRFP.)

Selection Criteria - Selection Criteria allows you to set the scope of the report’s contents. The available Selection Criteria will depend upon the report that you are running. In some reports, you must select multiple criteria.

Advanced Filter - The Filter provides a means to further refine your data set. The fields that can be filtered will depend upon the report that is being run.

Report Options - Report options allow you to add a cover page, table of contents, notes page, and/or footer notes to your reports. In some reports, you will also be able to reset the page numbers.

Run Report - You “click” on **Run Report** in the top right corner of the screen when you have finished making your selections.

Running a Standard Report

The following explains how to access and run a pre-formatted report.

STEP 1 - Report Selection. “Click” on the Report that you would like to access from in the Blue Navigation Pane. (See *Part F: Creating a LRFP*, page F.22, for a description of the Reports and their use.)

STEP 2 - Selection Criteria. Make a selection from the pull-down menu under Selection Criteria. The available Selection Criteria will vary depending upon the report that you are running. In some reports, you will be able to select multiple criteria by selecting the first record, holding down the **SHIFT** key, and selecting the last continuous record – or – by holding down the **CTRL** key to select non-contiguous criteria. Also, in some Reports, you will be able to organize the data by Site or School. This choice affects how Assets are displayed in the Selection Criteria pull-down menu and *not* the report.

STEP 4 - Report Options. “Click” on the appropriate box if you want to add a cover page, table of contents, notes page and/or footer notes to your reports. In some reports you will also be able to reset the page numbers.

STEP 5 - Run Report. When you have finished making your selections, “click” on **Run Report** in the top right corner of the screen. The Report opens as a *pdf* file.

Report Screen – List View

The screenshot displays the 'Existing and Proposed Site and Asset Inventory' report screen. The top navigation bar includes 'Home', 'Inventory', 'Enrollment', 'LRFP', and 'Reports' (highlighted). The left navigation pane lists various categories: Inventory (Site Asset, School Asset, Existing Room, Proposed Room), Enrollment (Projection Detail, Grade Alignment), Capacity (FES and District, Functional, Functional (Excluded SF)), LRFP Actions (System, Inventory, Summary), and Miscellaneous (LRFP Submission, Data Check, FES Room Type and SF Analysis, Data Browser). The main content area is titled 'Existing and Proposed Site and Asset Inventory' and includes a 'View Sample' link and a 'Run Report' button. Under 'Selection Criteria + -', there is a dropdown menu for 'LRFP' set to 'Proposed LRFP' and an 'Advanced Filter' button. Under 'Report Options', there are checkboxes for 'Cover Page', 'Reset Page Number', and 'Table of Contents'. There are also text input fields for 'Notes' and 'Footer Notes'.

Understanding the Data Browser

The Data Browser Tool allows you to create custom reports.

To access the Data Browser:

In the Reports section, “click” on Data Browser in the Blue Navigational Pane in the left side of the screen. The Data Browser screen will appear.

An overview of the Data Browser screen is as follows:

Data Browser Icons

Open – Opens a saved Data Browser Query Favorite.

Save – Saves Data Browser Query Favorite.

Delete – Deletes a Saved Data Browser Query Favorite.

Count – Provides a count of the records in the Data Browser Query based on the criteria selected.

Run – Runs the query.

Selection Criteria – Select the Site(s) and Asset(s) to be included in your query.

Maximum Rows – Default is set to 100 record rows. If the Count” icon indicates that your query will have more than 100 record rows, then change the ‘100’ to ‘0’ in order to display all record rows.

Format – A query can be output into CSV (Comma Separate Values) files that can be opened in or XML (can be run to use output in another report generator)

Selection Fields – Each Tab (County, District, Site, Asset and Room) allows the user to select none, one, or more than one field to be included in the query. A minimum of one field under one tab must be selected to produce results.

Filter – A filter will allow you to further customize the records set you are selecting.

Select All – Selects all of the records of the type that you are currently viewing, by automatically checking all the boxes in the current tab.

Clear All – Clears all of the boxes that have been checked in the current tab.

Reports

The screenshot displays the 'new jersey department of education' Reports section. The navigation pane on the left includes 'Data Browser' (highlighted with a red dashed circle and arrow). The main content area shows the 'Existing and Proposed Site and Asset Inventory' report configuration. The 'Data Browser' window is open, showing 'Selection Criteria' (Site and School), 'Selection Fields' (County, District, Site, Asset, Room), and a table of fields to be included in the query.

County	District	Site	Asset	Room
<input type="checkbox"/> ADDRESS1	<input type="checkbox"/> COMMENTS	<input type="checkbox"/> INVENTORYSTATUSID	<input type="checkbox"/> YEARCONSTRUCTED	
<input type="checkbox"/> ADDRESS2	<input type="checkbox"/> COMMISSIONDATE	<input type="checkbox"/> MAPCOORDINATES	<input type="checkbox"/> YEARRENOVATED	
<input type="checkbox"/> ARCHITECT	<input type="checkbox"/> CONSTRUCTIONTYPE	<input type="checkbox"/> MODIFYDATE	<input type="checkbox"/> ZIP	
<input type="checkbox"/> ASSETSIZE	<input type="checkbox"/> COSTMODEL	<input type="checkbox"/> NAME		
<input type="checkbox"/> ASSET_CREATEDBY	<input type="checkbox"/> CREATEDATE	<input type="checkbox"/> NUMRENOVATIONS		
<input type="checkbox"/> ASSET_MODIFIEDBY	<input type="checkbox"/> DECOMMISSIONDATE	<input type="checkbox"/> OLDFACILITYTYPEID		
<input type="checkbox"/> ASSET_NUMBER	<input type="checkbox"/> DESCRIPTION	<input checked="" type="checkbox"/> OWNERSHIP		
<input type="checkbox"/> ASSET_TYPE	<input type="checkbox"/> FLOORS	<input type="checkbox"/> RENOVATIONNOTES		
<input type="checkbox"/> ASSET_USE	<input type="checkbox"/> FOLDERID	<input type="checkbox"/> RESOURCES		
<input type="checkbox"/> CCI	<input type="checkbox"/> HISTORICALCODE	<input type="checkbox"/> SCHOOLID		
<input type="checkbox"/> CITY	<input type="checkbox"/> ID	<input type="checkbox"/> STATE		

Using the Data Browser


The following explains how to create a custom report using the Data Browser Tool.

STEP 1 – In the Data Browser window, under **Selection Criteria**, select whether you intend to select Assets grouped by Site or School.

STEP 2 – Next under **Selection Criteria**, select the scope of your query. You can hold down **Shift** or **CTRL** to select multiple records in each category.

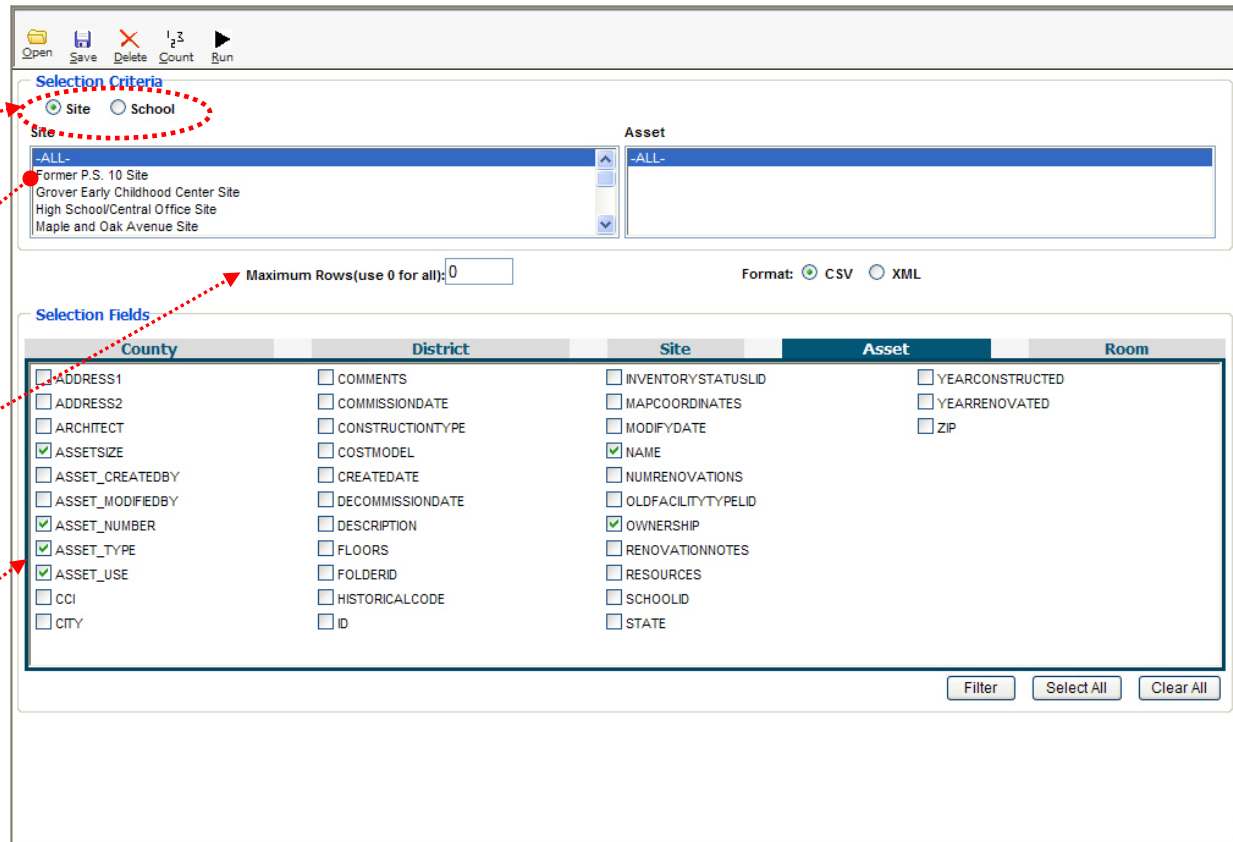
STEP 3 - Under Maximum Rows, type the maximum number of records you want the query to return. Type 0 to set no limit. “Click” on Count at anytime to see how many rows of data would be returned based on the current selection.

STEP 4 - Under **Selection Fields**, select the scope of the query. “Click” through each record type and select the check boxes of the fields that contain the data that you want to view

STEP 5 - When you finish making selections, “click” on the Run Icon  .

The report opens in a MS Excel spreadsheet.

Reports – Data Browser



The screenshot shows the Data Browser tool interface. At the top, there is a menu bar with icons for Open, Save, Delete, Count, and Run. Below the menu bar is the **Selection Criteria** section, which includes radio buttons for **Site** (selected) and **School**. Underneath, there are two lists: **Site** (containing: Former P.S. 10 Site, Grover Early Childhood Center Site, High School/Central Office Site, Maple and Oak Avenue Site) and **Asset** (containing: -ALL-). A **Maximum Rows** field is set to 0, and the **Format** is set to **CSV**. Below this is the **Selection Fields** section, which is a table with columns for **County**, **District**, **Site**, **Asset**, and **Room**. The **Asset** column is currently selected. The fields listed are:

County	District	Site	Asset	Room
<input type="checkbox"/> ADDRESS1	<input type="checkbox"/> COMMENTS	<input type="checkbox"/> INVENTORYSTATUSLID	<input type="checkbox"/> YEARCONSTRUCTED	
<input type="checkbox"/> ADDRESS2	<input type="checkbox"/> COMMISSIONDATE	<input type="checkbox"/> MAPCOORDINATES	<input type="checkbox"/> YEARRENOVATED	
<input type="checkbox"/> ARCHITECT	<input type="checkbox"/> CONSTRUCTIONTYPE	<input type="checkbox"/> MODIFYDATE	<input type="checkbox"/> ZIP	
<input checked="" type="checkbox"/> ASSETSIZE	<input type="checkbox"/> COSTMODEL	<input checked="" type="checkbox"/> NAME		
<input type="checkbox"/> ASSET_CREATEDBY	<input type="checkbox"/> CREATEDATE	<input type="checkbox"/> NUMRENOVATIONS		
<input type="checkbox"/> ASSET_MODIFIEDBY	<input type="checkbox"/> DECOMMISSIONDATE	<input type="checkbox"/> OLDFACILITYTYPELID		
<input checked="" type="checkbox"/> ASSET_NUMBER	<input type="checkbox"/> DESCRIPTION	<input checked="" type="checkbox"/> OWNERSHIP		
<input checked="" type="checkbox"/> ASSET_TYPE	<input type="checkbox"/> FLOORS	<input type="checkbox"/> RENOVATIONNOTES		
<input checked="" type="checkbox"/> ASSET_USE	<input type="checkbox"/> FOLDERID	<input type="checkbox"/> RESOURCES		
<input type="checkbox"/> CCI	<input type="checkbox"/> HISTORICALCODE	<input type="checkbox"/> SCHOOLID		
<input type="checkbox"/> CITY	<input type="checkbox"/> ID	<input type="checkbox"/> STATE		

At the bottom right of the Selection Fields section, there are buttons for **Filter**, **Select All**, and **Clear All**.

APPENDIX I: GENERATING REPORTS


Using the Data Browser

The following shows a Sample Data Browser Query.

Step 1 Selection Criteria – “Click” on Site Radio button. Then select “All” Sites and “All” Assets.

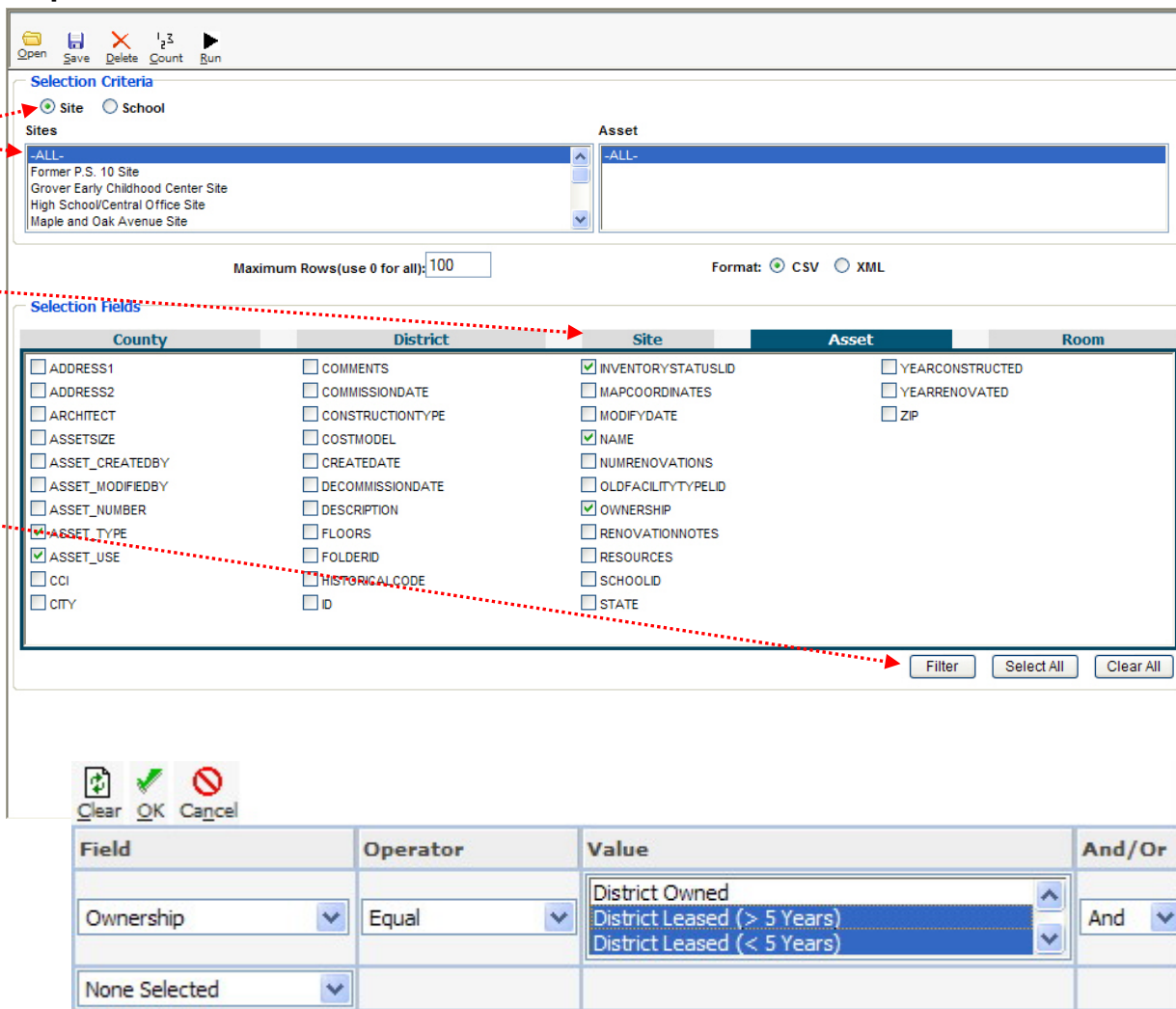
STEP 2 - Under Site Tab “Click” on “Name” field. Under Asset Tab “click” on Name, Ownership, Asset Number and Asset Type.

STEP 3 – “Click” on Filter while on the Asset Tab. Under Field select Ownership, leave Operator set to Equal and “click” on District Leased (>5 Years). While holding down the **shift** key select District Leased (<5 Years).

STEP 4 – “Click” on Run Report . The report opens in a MS Excel spreadsheet.

Note: This query will return all records that match the Filter Criteria of District Leased Assets. The fields displayed in the query will be those selected under Step 2. See Next page for results of Sample Query.

Reports – Data Browser



The screenshot shows the Data Browser interface with the following components:

- Selection Criteria:** Radio buttons for "Site" (selected) and "School". Two dropdown menus for "Sites" and "Asset" both set to "-ALL-".
- Selection Fields:** A grid of checkboxes for various fields across tabs: County, District, Site, Asset, and Room. Selected fields include ASSET_TYPE, ASSET_USE, INVENTORYSTATUSLID, NAME, and OWNERSHIP.
- Filter:** A filter criteria table at the bottom.

Field	Operator	Value	And/Or
Ownership	Equal	District Owned	And
		District Leased (> 5 Years)	
		District Leased (< 5 Years)	
None Selected			

Using the Data Browser

Reports – Data Browser Output

	A	B	C	D	E	F
1	SITE_NAME	ASSET_TYPE	ASSET_USE	INVENTORYSTATUS	ASSET_NAME	OWNERSHIP
2	P.S. 2 Site	Building	Temporary Facility	600	P.S. 2 Modulars	District Leased (< 5 Years)
3	P.S. 3 Remote Playground Site	Athletic Field/Playground		600	P.S. 3 Playground	District Leased (< 5 Years)
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