

# Reports

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## Reports Overview

Red Canyon Systems programs provide reports for every function: Log In Visits, Fitness Center Set Up, Participants Information, Facility, and Resources. There are two methods of obtaining reports – within a function or directly from the Main Menu. Whenever appropriate, a report filter is available. Using the filter, you can customize reports to meet specific needs. If the filtered report is one that you need frequently, you can save the filter with a name and use it every time you need that report. There is no limit to the number of filters that each report can have.

Use this section to learn how to:

This chapter of the manual explains how to perform the following activities:

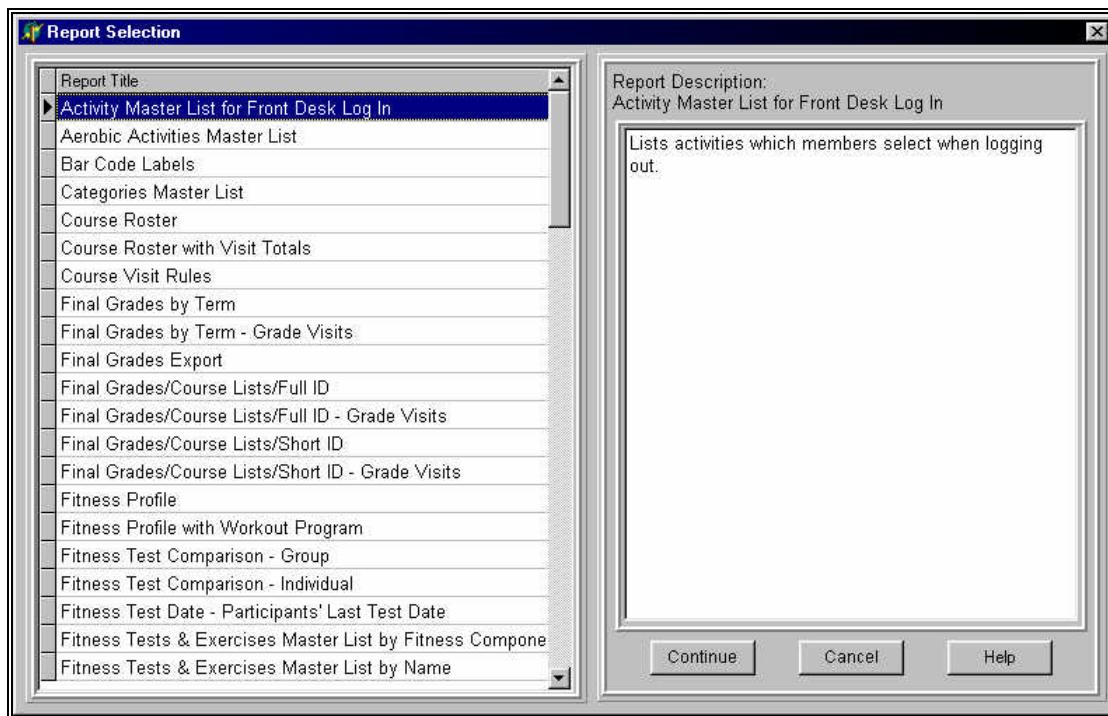
- Select Reports
- Set up filters
- Print reports
- Export report data to use in other programs
- Filter rules and guidelines with examples

If you would like to have a printed list of the reports available from your Red Canyon Systems program, you can select and print one of these reports: **Report Master List with Titles Only** or **Report Master List with Detailed Descriptions**. After you begin saving report filters, you can print the report, **Report Filter List**, to keep track of your filters.

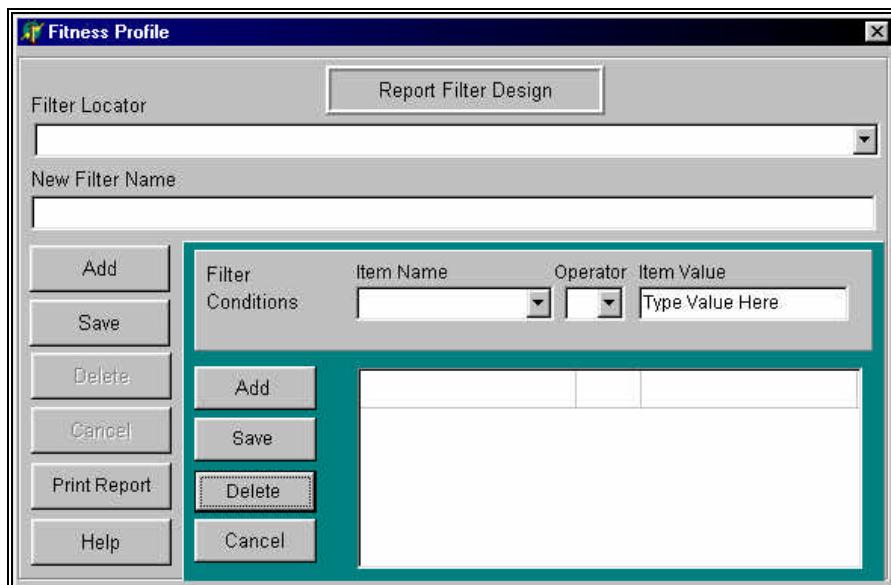
## Selecting Reports

Follow these steps to select reports.

1. Select **Reports** from the Main Menu or click on the Reports tab on any form. If you select **Reports on the Main Menu**, the following screen appears with reports listed by name in alphabetical order and a description of each report appearing in the panel on the right.



2. Use the scroll bar on the right side of the report list to move the list up and down on the screen.
3. When you see the report you need, click the mouse on it and click **Continue** at the bottom of the description panel. If a filter is available for the report, the *Report Filter Design* window appears.

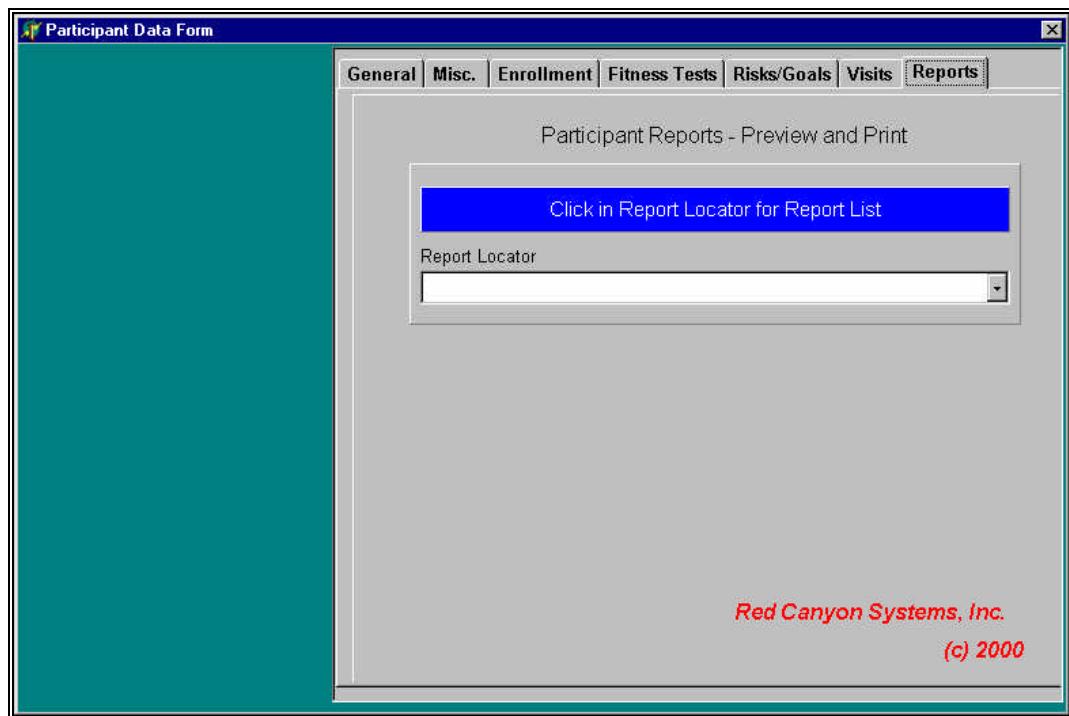


The first page of each report provides a summary sheet to identify what filtering and conditions, if any, were used for the report. You may want to keep the summary sheets for those reports for which you do not save the filter conditions as a specific filter design. In this way, you can look at the summary to see what criteria you selected for the report.

4. Follow the steps *Using Report Filters*.

If the report does not have a filter, the print preview of the report appears. Follow the steps in the section, *Printing Reports*.

If you select the **Reports** tab within a function – Participants, Facility, Resources, etc. – the Reports selection form appears instead of the Reports menu.

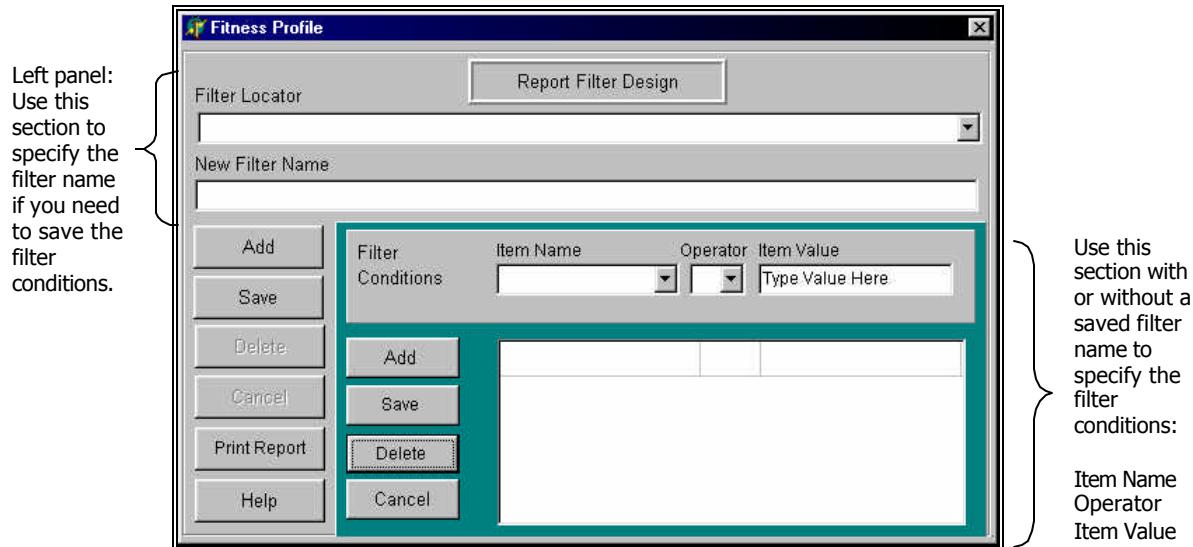


1. Click in the white space in the **Report Locator** field.  
A scrollable list of reports appears. For reference purposes, there is a master list of reports provided as one of the reports. It contains a listing of all reports and their descriptions.
2. Click on the appropriate report. A description of the report appears in the space below the selection buttons, **Continue** and **Cancel**.
3. Click **Continue**.  
If a filter is available for the report, the *Report Filter Design* window appears. Follow the steps - *Using Report Filters*.  
If the report does not have a filter, the print preview of the report appears. Follow the steps in *Printing Reports*.

## Using Report Filters

This section provides an overview and steps for using the report filter function.

When you select a report that can be filtered, the Report Filter Design window appears.



### Bypassing the Report Filter and Conditions

To create a simple report with no filter and no conditions:

4. On the **Reports** menu, click the report name.
5. Click **Continue**.
6. On the *Report Filter Design* window, click **Print Report**.
7. The *Confirm* window displays this message:  
*Do you want to save this filter for future use before printing?*  
Click **No**.

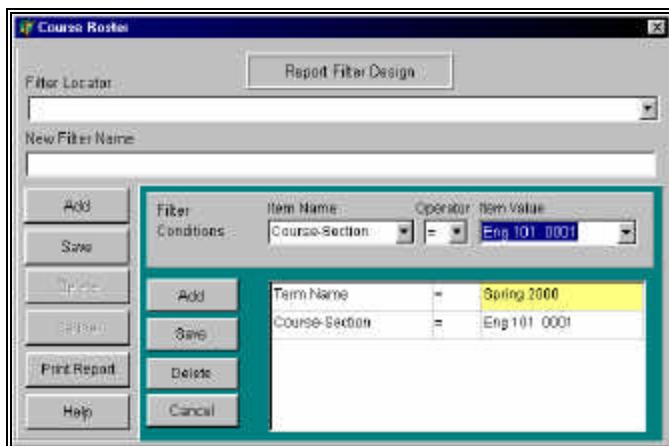


The report appears on the screen in **Print Preview** mode. This means that all pages of the report will be presented on the screen. In cases where you know in advance that the report will be brief, this is an excellent method of getting the report in the quickest way. However, if the report is lengthy, you would be better off using the filter to identify exactly what information you want on the report. (For example, you can narrow down a visit log for participants by identifying a begin date and end date range in the filter for that report.)

## Creating a Report Filter

Follow these steps to save filters for reports that you want to repeat. For example, if you want to get a course roster for just one course at a time instead of getting all courses, you could create a filter with the name of the course and save it. Later, when you want the same report, you just need to click on the report in the Reports menu and then click on the filter name in the Filter Locator list and then click Print. The filter conditions that you specified before are displayed on the Report Filter screen and they will be used to generate the report.

8. **Optional:** To create and save a filter for a report, click **Add** in the far-left panel. The cursor appears (blinking) in the **New Filter Name** field. If you do not want to save the filter to use the same conditions again, ignore the **Filter Locator** and **New Filter Name** fields at the top of this screen and go directly to the *Filter Conditions* section. Follow steps 3-6.
9. In the **New Filter Name** field, type a name that describes the filter. Click **Save**. The next time you select this report, the filter name will be available in the **Filter Locator** list.
10. In the **Filter Conditions** section, click **Add** to open the condition fields for the report.
11. Select from the drop-down list in the **Item Name** field.
12. Select an operator (= > <, etc.) from the next list.
13. In the **Item Value** field, select a value for the drop-down **Item Value** list and click **Save**.
14. Continue setting up additional conditions, using **Add** and **Save**, and then click **Print Report** when you are done. Here is a sample of the Report Filter Design window with conditions only, no saved filter name. It was set up to create the Course Roster report with conditions for Term = Spring 2000, and Course Section = Eng 101/0001.



## Selecting a Saved Report Filter and Printing the Report

Follow these steps to use a filter that you have saved for a report. In this example, we use the same filter that we used in the previous instruction, Creating a Report Filter.

15. On the **Reports** menu, click on the report name.
  16. On the *Reports Filter Design* window, click in the **Filter Locator** field at the top.
  17. In the drop-down list, click on a filter that you want to use. The name of the filter displays in the **New Filter Name** field and the conditions of the filter display in the *Filter Conditions* section.
- You can add more filter conditions and save the filter again or you can just print the report. If you add more filter conditions, make sure you click **Yes** in the message box that appears.

18. Click **Print Report**. Respond **Yes** or **No** to the prompt to save the filter for future use. If you have changed the filter conditions and want to save them, click **Yes** and then respond **Yes** when asked if it is okay to overwrite the filter.

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## Printing Reports

This section provides the steps for printing reports and an overview of the Red Canyon Systems report printing tools.

After you have specified a filter or selected a report, click **Continue** or **Print Report** to create a "print preview" of the report. The report appears on the screen in "print preview" mode.

Use the Print Preview toolbar at the top of the window to view pages, print, select a printer, export report data to a different file/program format, and to change the view.



Buttons on the *Print Preview* toolbar provide the following actions:

- Click to return to the Report Locator or Report menu.
- Click navigator buttons to move from page to page in the report (from left to right the buttons mean: starting page, previous page, next page, ending page). On long reports, you can click the navigator button to stop the report from building. It will only display as much as it was able to build before you clicked the navigator button. When you see "1 of 1+" or numbers with a +, it means that there are more pages to the report.  
Click to go to the end of the report and to see how many pages there are. Then click to go to the start of the report. The indicator will then change to show you the correct page range.
- Click the printer button to open the *Print* window in which you select the pages to print. If you have produced a very large report, you may want to select a page range using the *Pages/From – To* option instead of the *All* option.
- Click the printer button (showing a yellow connection) to select a different printer (printers only show in the selection list if they have been added originally through the Windows Printer function.).
- Click the button with the envelope and down arrow to export the data from the report to another format (spreadsheet, text file, etc.).
- Click the list display button to turn on/off the contents display on the left side of the screen. This display (view) is relevant when you are reviewing participant reports.
- Click the percentage field to select a zoom in and out percentage.

## Exporting Report Data to External Programs and Files

The Print Preview function of reports provides the capability to export the report data to another program or file type. This is useful when you need to send attendance data or fitness test data for purposes of state reporting. You do not have to rekey the data or send a paper copy. You can export the reports data to a required file format and send it electronically. Red Canyon Systems offers the following formats for exporting the report data:

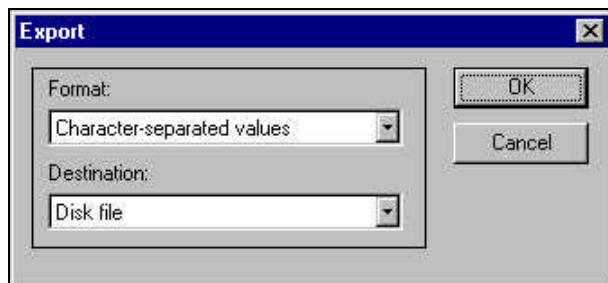
- ASCII character delimited
- ASCII tab delimited
- Excel, 2,3,4 or 5
- Lotus
- Columnar Record
- WinWord
- ASCII comma delimited
- DIF
- HTML
- Paginated Text
- Rich Text
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To export the report data to another program or file type, follow the steps in this manual. This manual does not explain how to open the file in another program or offer details on what export formats to choose. If you need assistance with selecting the correct export file format or how to open the file after exporting it, please ask someone in your Information Systems and Services department.

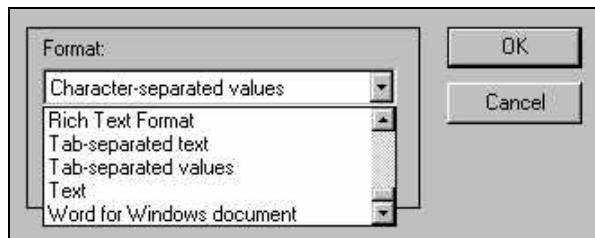
### How to Export Report Data

Prepare the report using the report menu selection and filter selection steps, as provided for all reports. Once you have the report data that you need on the Print Preview screen:

19. Click on the export icon in the **Print Preview** tool bar:   
The first *Export* window appears.



20. Select the format of the file by clicking in the **Format** field.  
A drop-down list appears for your selection of a file type.



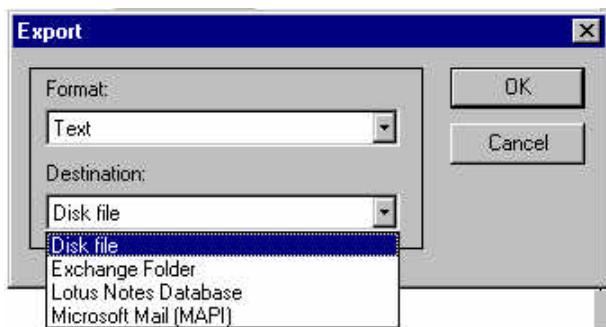
There are selections for almost all file types you might need - Excel and Lotus file types, simple text, and formatted text with commas and tabs to separate fields of data. You can also export

the report to look the same as it does on the screen (minus graphic lines) to a Word file or an RTF (rich text format) file.

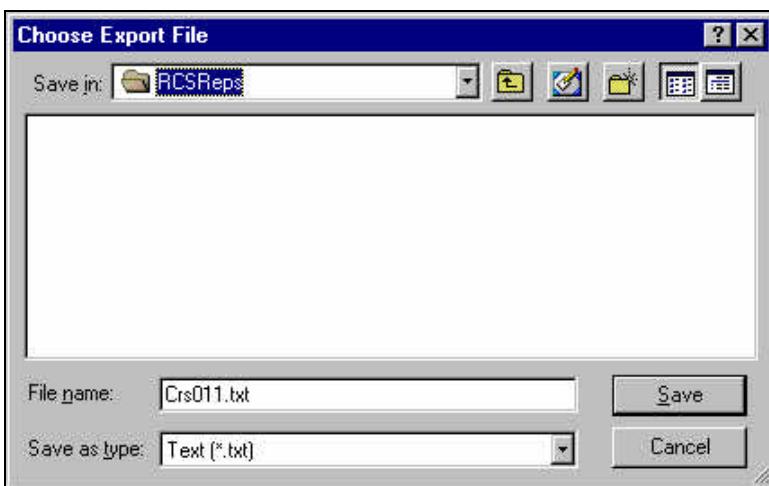
21. Click on the format type to select it.
22. In the **Destination** field, you must select a method of storing the exported file. If you select "disk" you must identify its location. If you select a mail option, and you have a mail program on your computer, a series of window dialogs appear asking you for the location of the mail folder and other items.

If you do not know how to specify mail folders and set them up, please ask someone who coordinates your site's email service for assistance. Each email program has different specification requirements that are outside the scope of Red Canyon Systems.

23. Click in the **Destination** field and click one item in the drop-down list of storage destinations. If you select *Disk* as the destination type, identify the location on disk where the file should be stored in the *Choose Export File* window that appears.



24. In the **Save in** field, locate the correct folder, using Windows standard search functions to find the folder (down arrow or folder with the Up arrow next to the **Save in** field).  
In the **File name** field, type the name of the file. You do not need to type the 3-character extension. It will be inserted automatically when you click **Save**.



25. If you select a mail folder option – *Microsoft Mail MAPI* or *Exchange* folder, you must know the location of your profile. Enter it on the *Profile* window that appears. For assistance, ask your email coordinator on site.
26. If you select *Lotus notes database*, the path and required DLL files must be present on your computer.

# Report Filter Rules and Guidelines

Do not use the same selection criteria (course/section, term, visit date, category, etc.) with an equal sign (=) as the operator more than once in any report filter.

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### **Example 1:**

Do not use the following report filter for the Course Roster report:

Course code/section = Math 110-0001

Course code/section = Math110-0009

This type of filter condition means that the report is to look for records that meet both conditions before it prints. In this case, no records would be found. The correct way of creating filter conditions if you wanted a course roster for Math 110-0001 and one for Math 110-0009 would be:

This set of filter conditions would give you a course roster report for all the Math 110 courses that have section numbers between 0001 and 0009.

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## Example 2:

The same guidelines apply when you select conditions that filter by dates.

Only enter one condition for a date if you use the = operator.

If you want to get a report with data that falls between two dates, use the following types conditions:

Visit Date >= 05/01/2000

Visit Date < = 05/03/2000

This set of filter conditions would give you a Visit Log for all visits that occurred between May 1, 2000 and May 3, 2000.

**The Name field is the Exception to the = operator rule stated above:**

When you add filter conditions based on the Participant Name (Name is what appears in the drop-down list under Item Name), you can enter more than one condition that uses the = operator.

For example, you could enter the following conditions to obtain a Visit Log by Participant.

Name = Bruce, Leigh 234234234

Name = Killian, Red 988988988

Name = Jansen, David 777777777

This set of filter conditions would provide a Visit Log report showing visits for Leigh Bruce, Red Killian, and David Jansen.

## **Fitness Profile and Fitness Profile with Workout Program Reports**

You will be prompted with a reminder to specify the fitness **Test Date** as part of a filter condition for these reports. The following is recommended for specifying the condition.

**Test Date** > date selected from the calendar that displays for this field.

Click in the **Item Value** field to open the calendar, scroll through the calendar to find the correct month and year. Click on the day in the month.

You can also select Participants by Name/ID and other conditions for this report.

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## Sample Reports

Samples of all reports generated by Red Canyon Systems from the demo database have been provided on the CD ROM that came with this manual and your installation. They are provided in the files named RCSLoginSampleReports.PDF and RCSFitnessSampleReports. View these files on the CD-ROM or copy it to your computer if you want to review sample reports. You can also obtain this file for the product you use by going to our website at [www.redcanyon.com](http://www.redcanyon.com) and look for the link to Sample Reports for the product you are using.

You must use Adobe Reader to open the file, view it, and print it if you want a hard copy of the reports. If you do not have a copy of Adobe Reader on your computer, you can obtain it as a free download from [www.adobe.com](http://www.adobe.com). It uses very little disk space and installs quickly and easily. Once it is installed, it opens any file that has an extension name of "PDF" indicating that it is a portable document format.