



Data Management Services

THE BUSINESS OF EDUCATION

Copying RTF SIMS Reports

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Fully accredited by Capita SIMS for proven quality of SIMS support

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Introduction

Creating a SIMS report that outputs through a user defined rtf template is quite often a difficult and time consuming process. Imagine the frustration a user feels when this report later corrupts!

Corruption mainly occurs when the SIMS report has been copied as a basis for a new report, and the Word rtf template has been edited. The new SIMS report, instead of copying the rtf template, simply removes it from the original report, and consequently when running the original report, the user gets the error "Unable to load reportform.rtf".

Our standard advice of exporting user defined reports has not changed. This provides the simplest and most efficient way of being able to import a working version of the report should the worst happen. However, care should be taken to prevent reports from corrupting where possible.

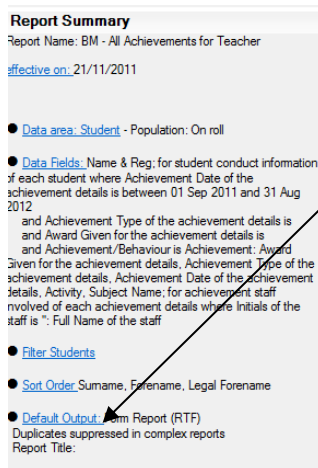
This document will guide you through an alternative process to copying SIMS reports with rtf templates that keep both original and copy separate thus preventing corruption from occurring.

Required process for copying a SIMS report that outputs to RTF Template

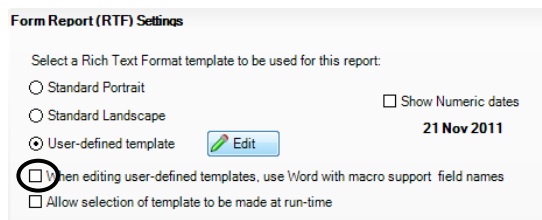
1. Open the RTF Template of the original report. (Page 2).
2. Save the Word RTF Template to a location of your choice. (Page 2).
3. Create a new SIMS report using **Load from an existing report**. (Page 3).
4. Attach your saved RTF Template to the new SIMS report. (Page 3).
5. Save your new SIMS report. (Page 4).

Saving a Word RTF Template

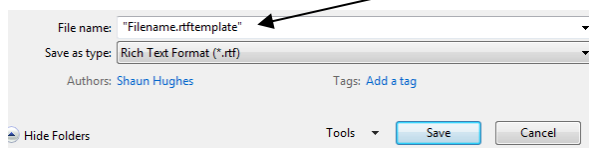
1. Select **Reports > Design Report**.
2. Click **Open an existing report**.
3. Navigate to the report you wish to copy from and double-click to open.
4. In the Report Summary panel, click **Default Output**.



5. Un-tick **When editing user-defined templates, use Word with macro support field names** and click **Edit**.



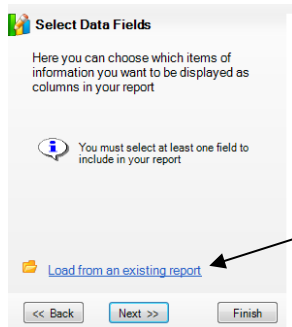
6. In the Word template, click **File > Save As (2003) or Office button > Save As (2007)**.
7. Navigate to an area you wish to save the template to. This may be your own area or a portable device.
8. Ensure the **Save as type** states **Rich Text Format (*.rtf)**. **Replace** the file name of **ReportForm.rtf** with a **filename of your choice** and add the extension **.rtftemplate**. **Insert a double quotation mark at the beginning of the filename AND at the end of the extension.**



9. Click **Save**.
10. Close Word. Close the SIMS report design **WITHOUT** saving.

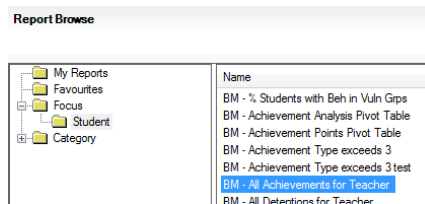
Creating a new SIMS Report

1. Select **Reports > Design Report**.
2. Click **Create a new report**.
3. Choose your required **Data Area**. Click **Next**.
4. Make a selection in **Refine Data Area** if required and click **Next**.
5. In the **Select Data Fields** area, click **Load from an existing report**.

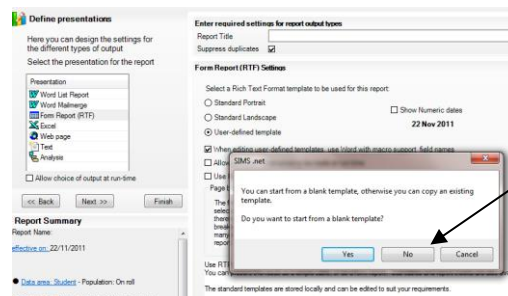


You can only **Load from an existing report** from the same Focus area as the new report.

6. From the Report Browse, navigate to the report you wish to copy from and double click to select. This will copy the fields and any sub report filters from the existing report into your new report.

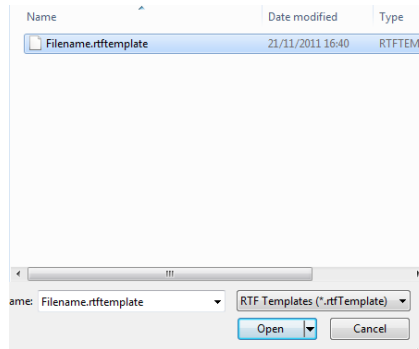


7. Make any required amendments to the area and click **Next**.
8. Work through the remaining design screens, clicking **Next** to move to the next section until you reach the **Define Presentations** screen. **Load from an existing report** can be also be used in the **Apply Filter** and **Define Sort Order** sections as required.
9. At the **Define Presentations** screen, choose **Form Report (RTF)** from the menu in the left hand panel and choose **User-defined template** from the list in the right hand panel. A message will appear asking if you would like to start from a blank template. Click **No**.

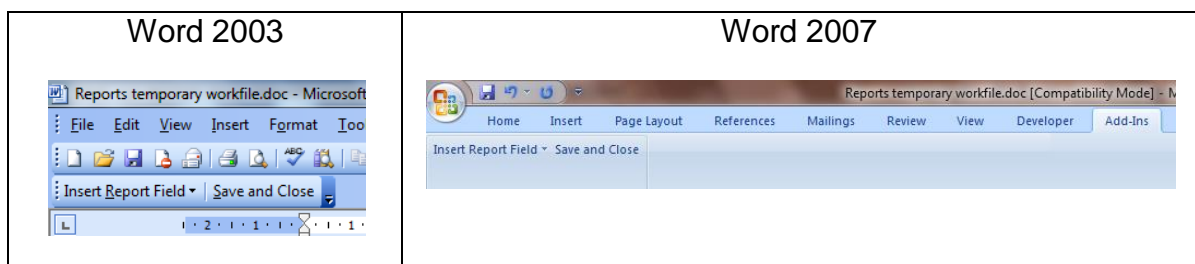


Click No

10. Navigate to your saved **rtf template** file from earlier and click **Open**.



11. The Word template will now open. Make any required amendments. Once finished, click the **Save and Close** button. This can be found towards the top left of the screen in Word 2003 or in the **Add Ins** ribbon in Word 2007.

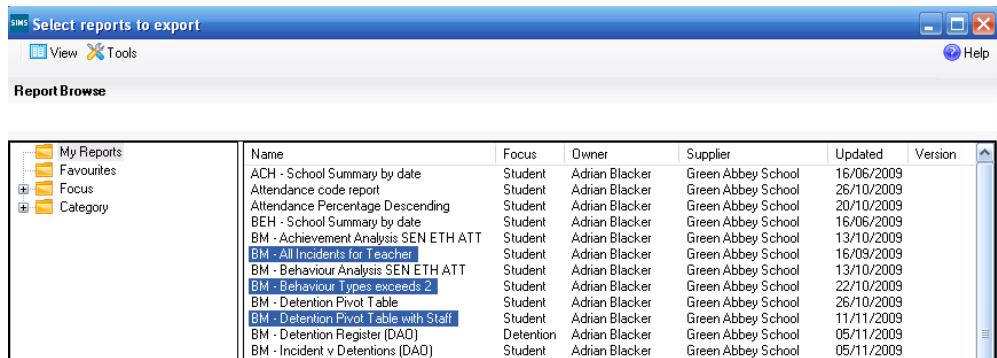


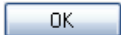
It is imperative that the Save and Close button is pressed rather than the Save icon, otherwise any changes will be lost.

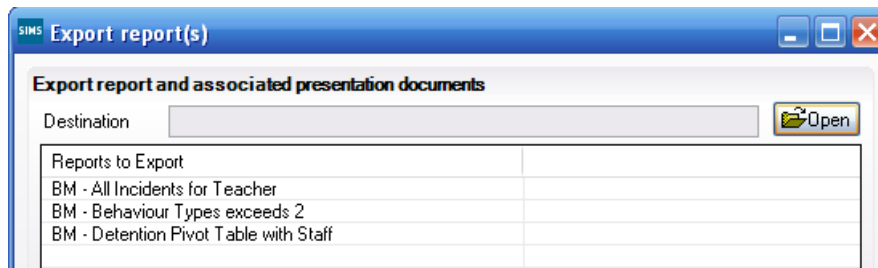
- 12. Once back in the SIMS report design, click **Save As**. Name your report as appropriate and un-tick the **Private** box if you require other SIMS users to use your report.
- 13. Close the report design, clicking **Yes** if prompted to save again.
- 14. Ensure the report runs as expected using **Reports > Run Report**. Your new report can now be **exported to an external location** and imported again should the template corrupt in the future.


Exporting SIMS Reports to an External Location

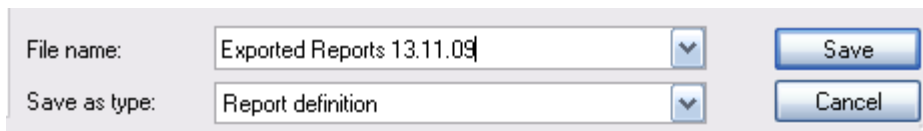
1. Select **Reports > Export**.



2. Click on the report you wish to export (hold down the Ctrl key to select multiple reports).
3. Click **OK**. 



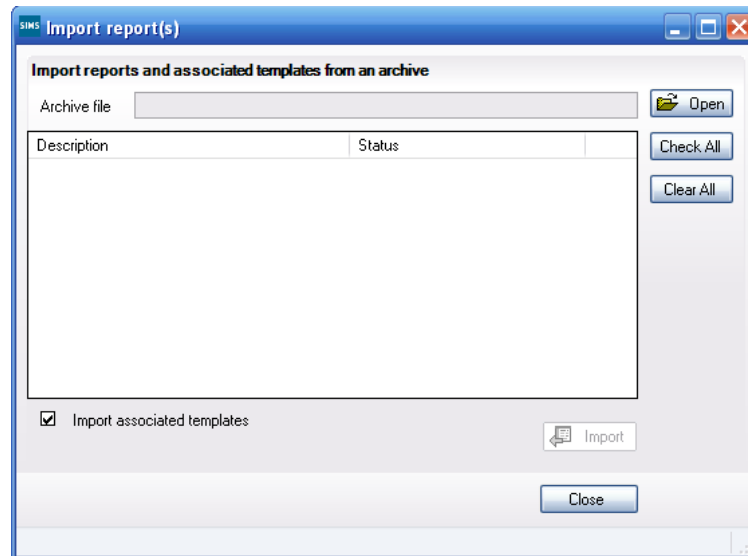
4. Click the **Open** button  and navigate to an area you wish to save the exported file to. This may be on your own area or a portable device.
5. Give the file a name and click **Save**.




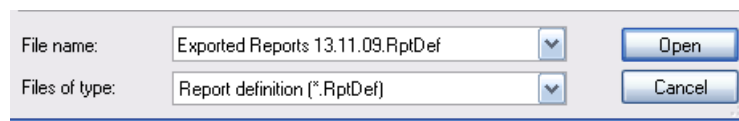
6. Once back in the **Export report(s)** dialog, click **Export**. 

Importing an Exported Report

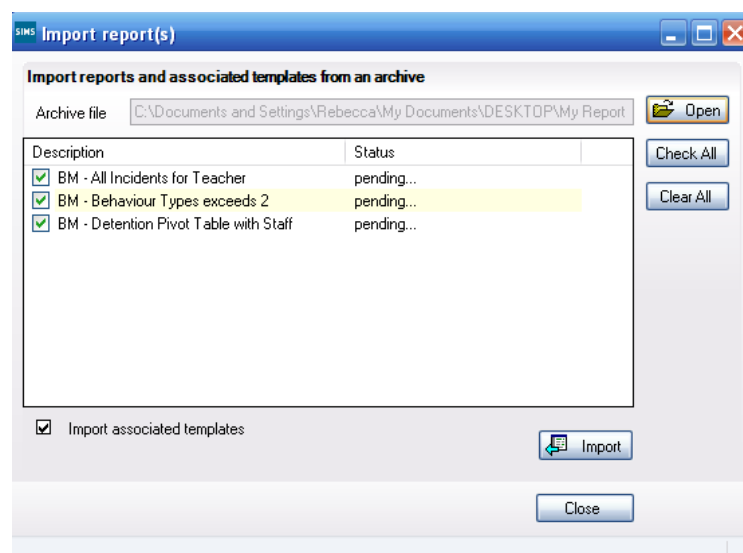
1. Select **Reports > Import**.



2. Click the **Open** button  and navigate to the saved Report Definition file.
3. Select the file and click **Open**.



4. Select the report(s) you require by ticking the adjacent box(es). You can use the **Check All** or **Clear All** buttons as appropriate and click **Import**.





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