



Report



Designer

User Manual

Deisigner is a product of Phoenix Learning Systems (www.phoenixlearning.com).
V 2.2

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Chapter 1: Downloading and Registration

Purchase Report Designer

Print and fill out the sales form found at www.phoenixlearning.com and FAX the sales form along with a Purchase Order (PO) to the FAX # on the form:


ORDER FORM
Fax: 801-489-1947

To order our products or services by fax, simply print out this form and fax it with a purchase order to 801-491-9798.
 To order by phone, please email us at info@phoenixlearning.com and a representative will contact you personally.
 To order by mail, send check or purchase order to:

Phoenix Learning Systems • 1103 E. 350 S. • Springville, UT 84663

| | | | |
|--|--------------|------------|--|
| Bill To: | | | |
| Name: _____ | Date: _____ | | |
| School or Company: _____ | P.O.# _____ | | |
| Address 1: _____ | City: _____ | | |
| Address 2: _____ | State: _____ | Zip: _____ | |
| Email: _____ | Phone: _____ | | |
| <small>(Required for Product Registration)</small> | | | |
| Ship To: | | | |
| Name: _____ | Date: _____ | | |
| School or Company: _____ | P.O.# _____ | | |
| Address 1: _____ | City: _____ | | |
| Address 2: _____ | State: _____ | Zip: _____ | |
| Email: _____ | Phone: _____ | | |
| <small>(Required for Product Registration)</small> | | | |

| Products | Unit Price | Quantity | Total Price |
|---|--------------|----------|-------------|
| ClassChoice - \$2 per student per year | \$2.00 | | |
| Family Association Records Manager - FARM | \$695.00 | | |
| Mail Merge - District Site License | \$995.00 | | |
| Parent Teacher Conferencor (PTC) - Single School License | \$495.00 | | |
| Phoenix Report Designer - District Site License | \$995.00 | | |
| Phoenix Report Designer - Single-User License | \$495.00 | | |
| Phoenix Security Guard | \$995.00 | | |
| Utah State Preprint | \$495.00 | | |
| Object Reports | | | |
| Level 1 - Form Letters, certificates, etc. | \$200.00 | | |
| Level 2 - Lists, Rosters, Schedules, Health, Registration, Enrollment, etc. | \$500.00 | | |
| Level 3 - Report Cards, Transcripts, Cum. Labels | \$1,000.00 | | |
| HTML Customization | | | |
| Level 1 - Modifications to existing HTML pages | \$200.00 | | |
| Level 2 - New multi-column, multi-row forms | \$500.00 | | |
| Level 3 - Complex custom layouts | \$1,000.00 | | |
| Non-Education sales | Tax | 6.25% | |
| | Total | | |

To get a copy of the sales form, go to www.phoenixlearning.com/sales/sales.html.



Chapter 1: Downloading and Registration

Registration

Once you have purchased Report Designer, you will receive an email similar to the picture below with your registration information:

Thank you for purchasing Phoenix Report Designer.

This product is registered to: Phoenix Tech Writer
Your Registration Code is: **xxx-xxxx-xxxx**

Place the enclosed "_key.txt" file in the same folder as your application before you launch the application.

You can download Designer by clicking here - <http://www.phoenixlearning.com/downloads/downloads.html>

If you have purchased the single-user license and need to add additional users in the future, you may upgrade to a district site license at any time for the difference in price.

Phoenix Learning Systems

The email you receive will include a .txt file titled: "_key.txt," your registration code and the link to the downloads page at www.phoenixlearning.com.

Once you have downloaded the application and placed it in a folder on your system, you will need to place the "_key.txt" file into the same folder in order for Report Designer to launch properly.

Steps to Download

1. Select the link in the registration email or enter the link information into your Internet browser.



2. Select the link next to Report Designer that identifies the type of computer you are using: MacOS or Windows.

Download the additional tutorial files and sample demo data, if desired.

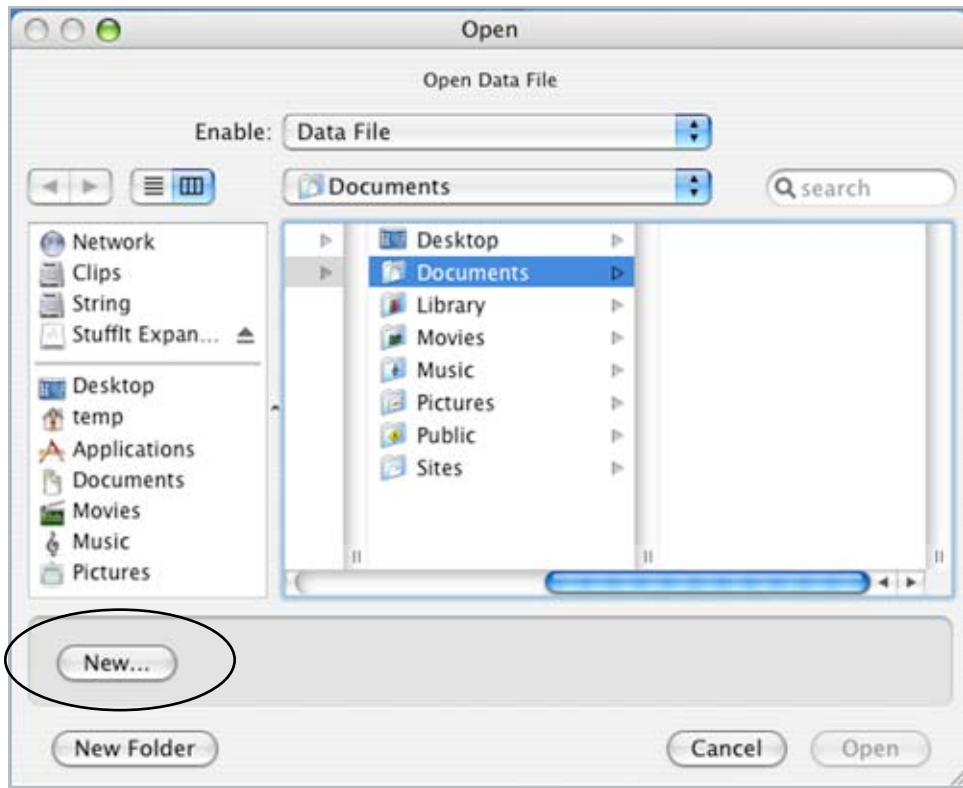


3. If necessary, un-package the compressed file(s).
4. Place the unpackaged application and the _key.txt file together in a folder on your system.

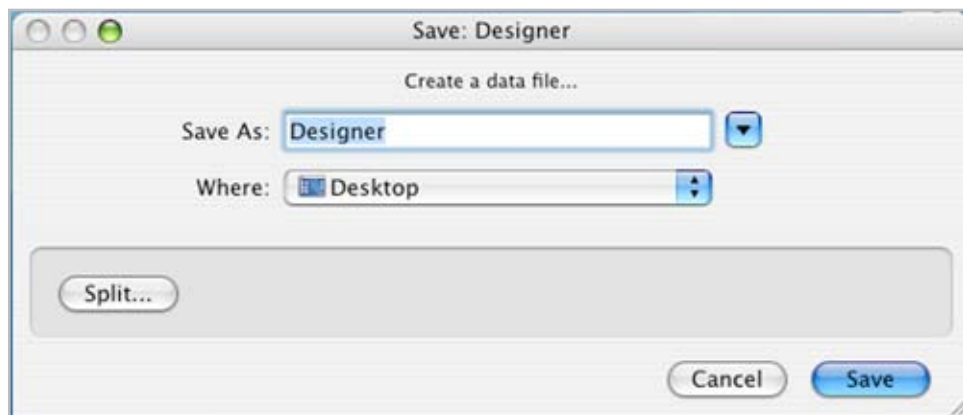
Report Designer 2.2

Steps to Register

1. Double-click on the Report Designer application.

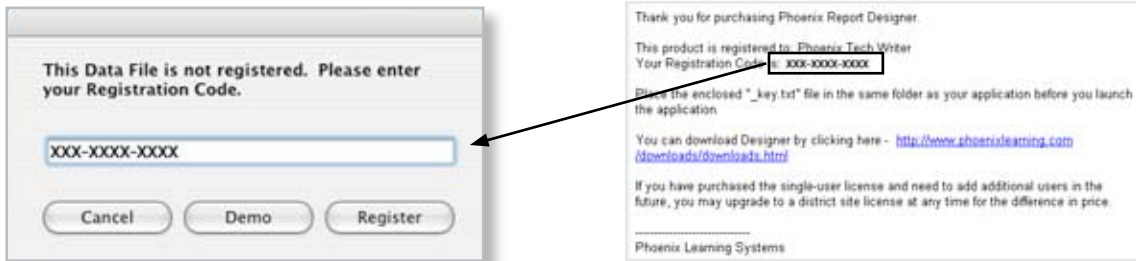


2. Select NEW to create a new data file.



3. Title the data file and save the file to the Report Designer folder. Select SAVE.

4. Fill in your registration information. You may cut and paste from the registration email.



5. Select REGISTER. Report Designer will automatically register and open.



When Report Designer first opens, the bar above will display on your desktop. You are now ready to begin using Report Designer!

NOTE: Screen captures in this manual were taken with MAC OS X. If using a Windows operating system, the screens will appear different.



Chapter 2: Introduction

Overview

Welcome to Report Designer! Designer was developed to create customized object reports like report cards, schedules, medical information sheets and more with and without references to database objects. With Designer, you can design the way information is displayed in order to customize them for your school.

Phoenix Report Designer is an XML-based software that can export reports in a format that is compatible with PowerSchool® (PS) Student Information System. Reports, certificates, form letters, transcripts, schedules, record stickers, trip reports and much more can be designed and created easily using the Designer WYSIWYG (What You See Is What You Get) format, then imported to PS for use.

Designer combines familiar page layout tools such as lines, boxes and text objects with special transcript and schedule layout tools to make report creation quick and simple. Templates and components can be created, used and re-used to make report creation even quicker.

NOTE: To quit Designer, use **Designer > Quit Designer** before attempting to close down your computer and turn it off.



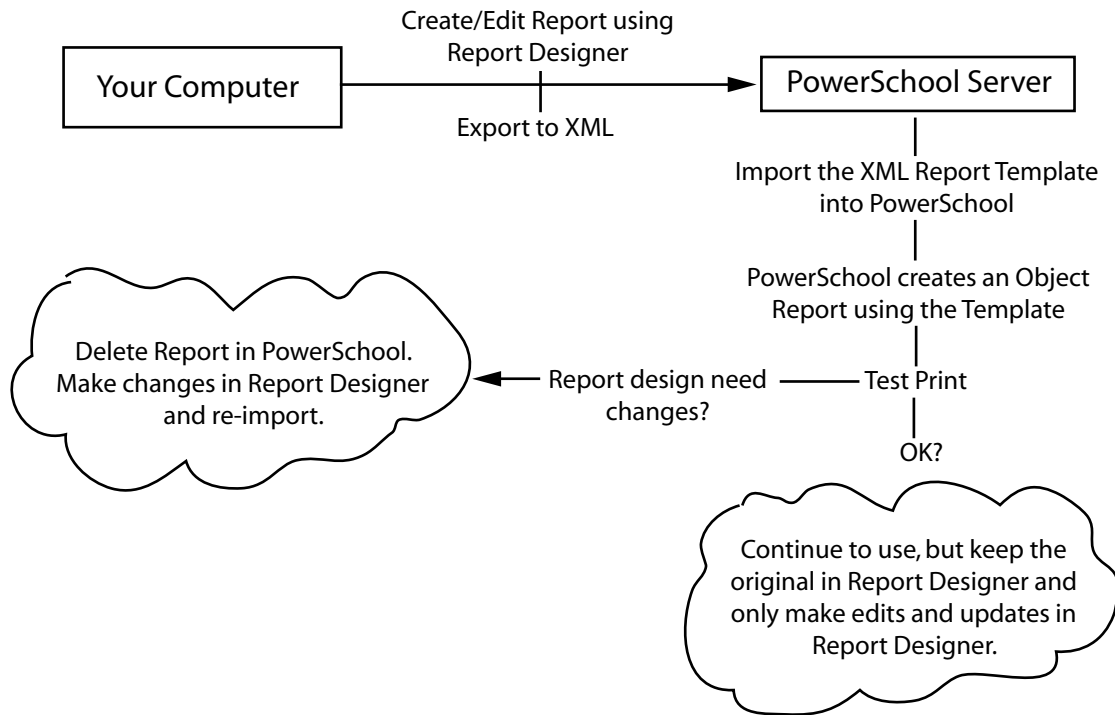
Chapter 2: Introduction

Overview of Workflow

Report Designer provides a smooth exchange of files between your computer and the PowerSchool server. The PowerSchool server recognizes XML, a form of markup language, so Report Designer provides the ability to export any newly created report form to XML.

Create a New Report from Scratch

The chart below shows the workflow process when creating a new report form for use in PowerSchool.

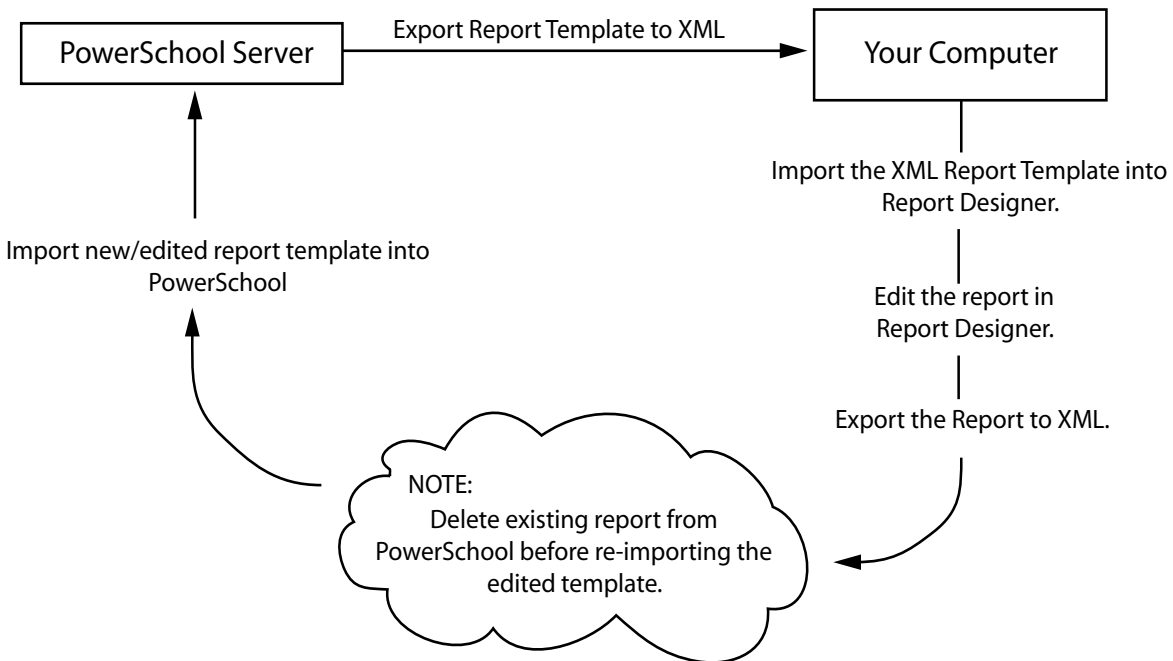


Edit an Existing PS Report Template

Report Designer allows you to edit existing PowerSchool report forms by allowing XML import. PowerSchool exports forms to XML and Report Designer allows you to import that XML form and edit it in Report Designer.

Once you have completed making the changes to the old report, you may export that report form to XML in order to re-import it into PowerSchool.

The chart below shows the workflow process when editing or changing a report that already exists in PowerSchool.

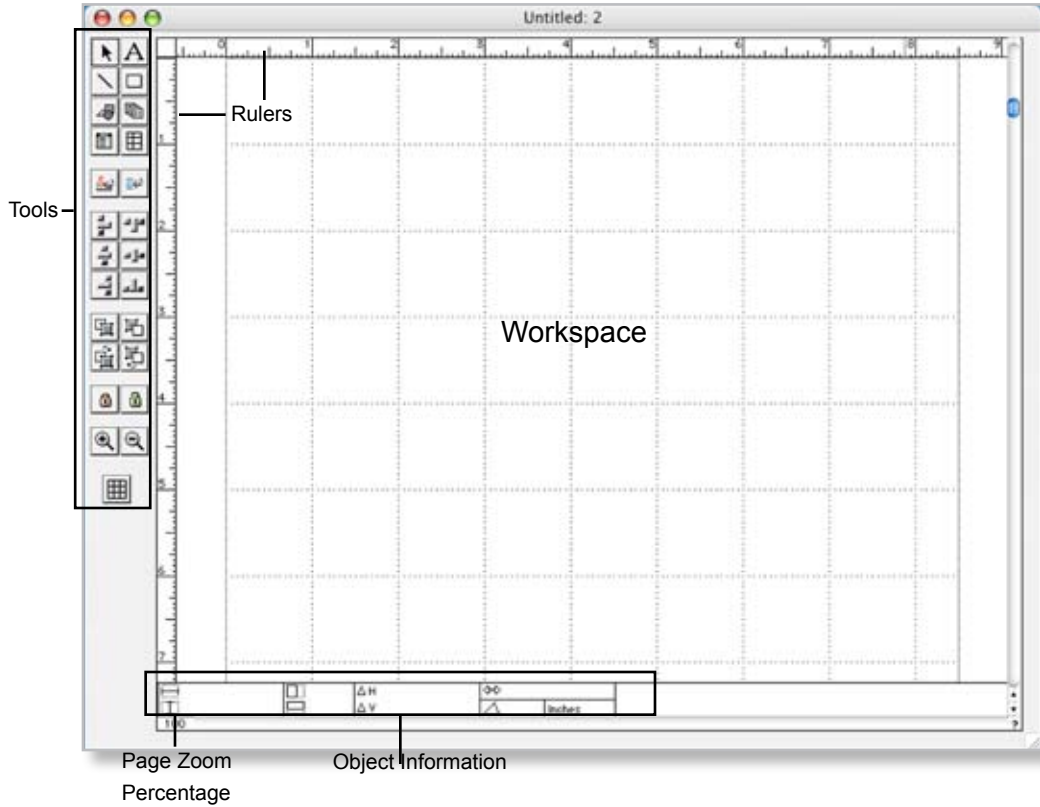




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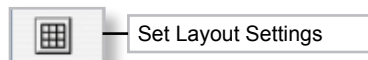
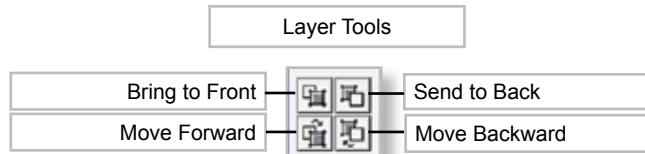
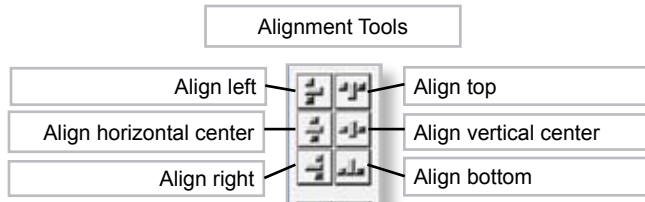
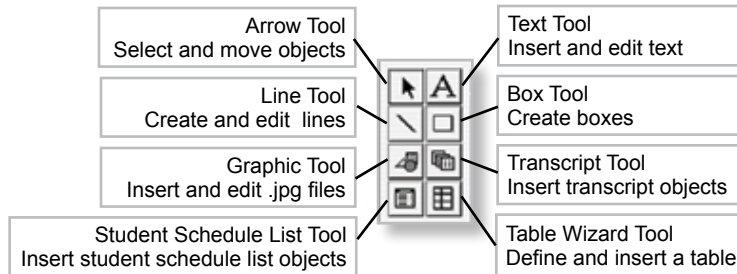
2-4

Basic Features of the Designer Workspace



Designer Workspace Tools Overview

If you are familiar with layout software, you will find the tools and functions familiar.



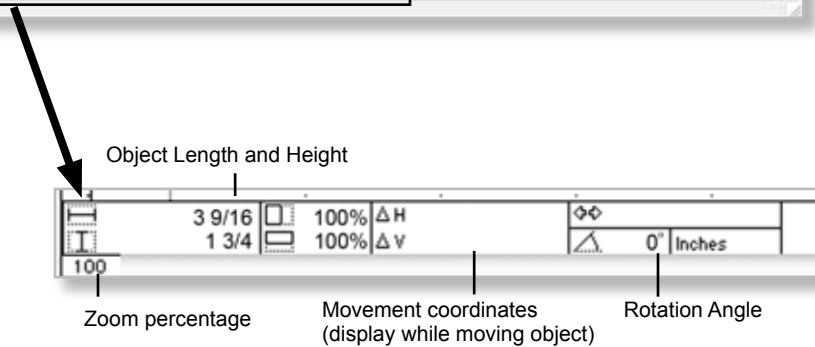
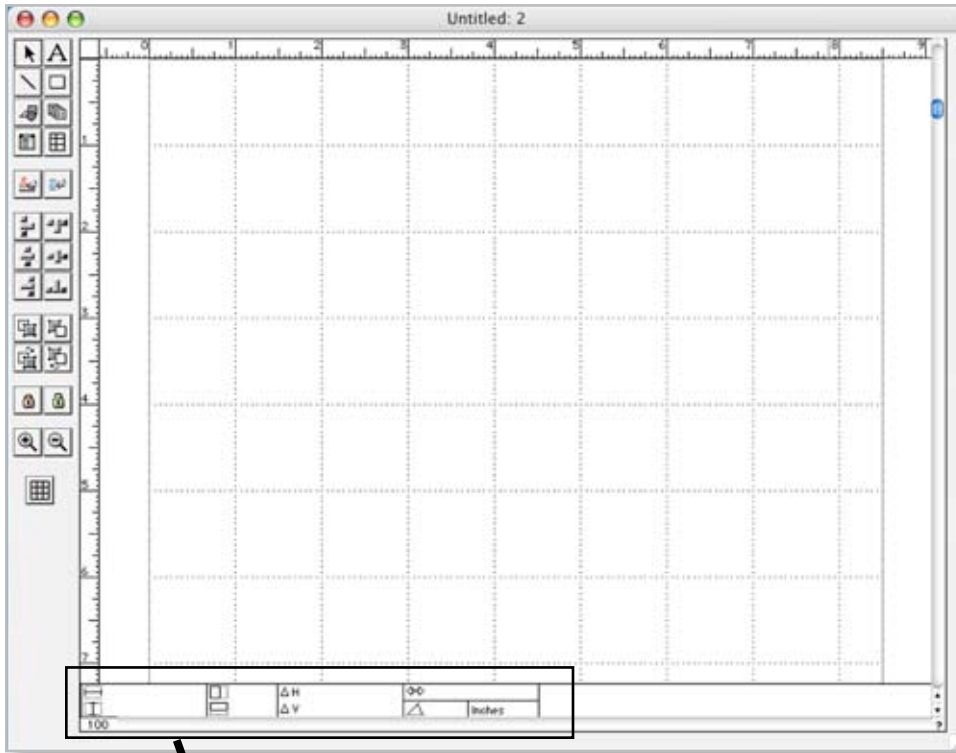


Chapter 2: Introduction

2-6

Designer Workspace Information Overview

The Designer Workspace provides information to help set objects precisely on the page.

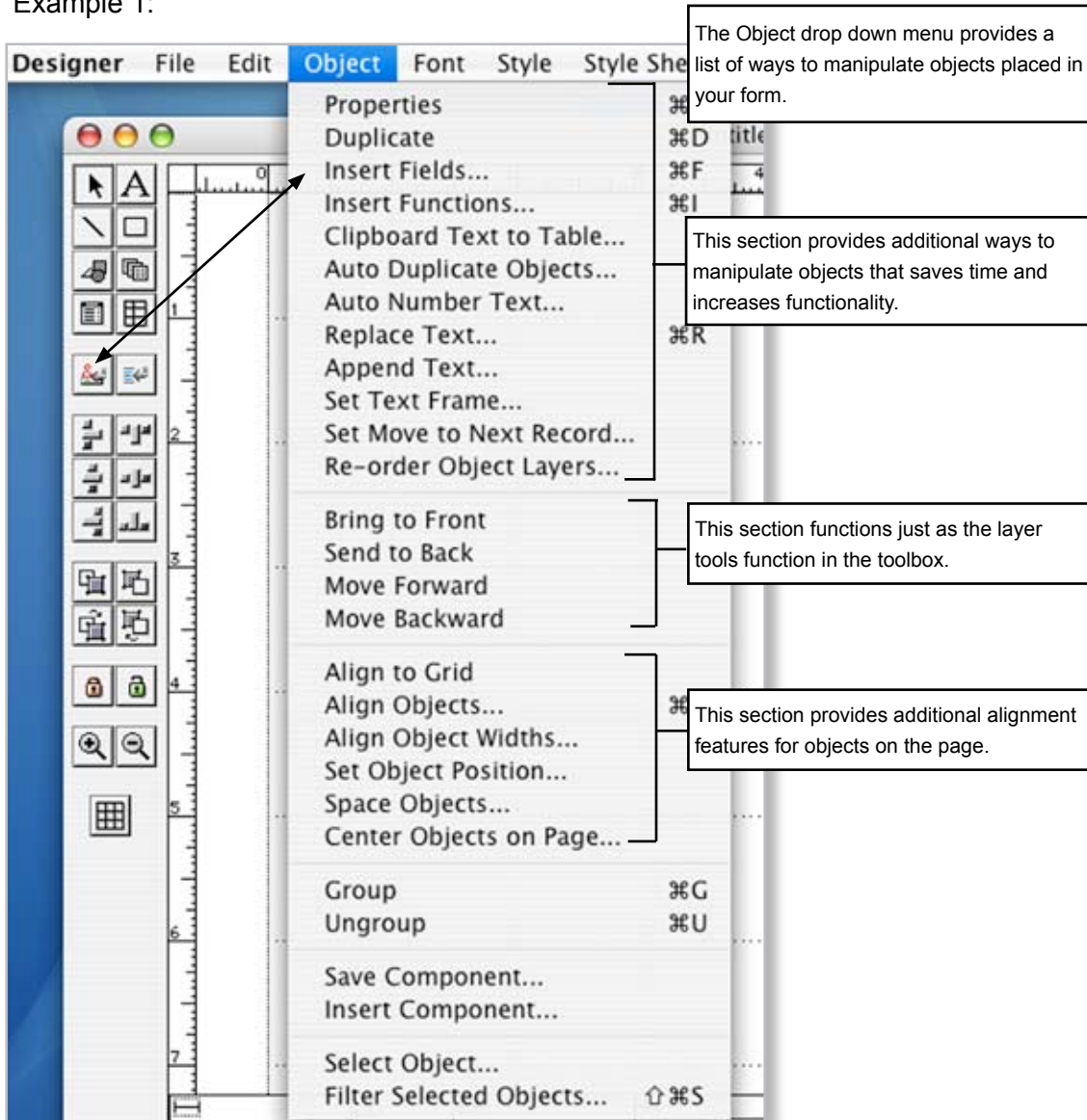


These tools are all covered in detail in the following chapters of this manual.

Menus Overview

Report Designer provides drop down menu functionality plus shortcut listings similar to other document design or layout software. Some of the drop down menu features are another way to access the Designer tool features, and some are additional options used in designing the report.

Example 1:



The Insert Fields selection functions the same as selecting the Insert Fields tool from the Designer Workspace Toolbox. Both actions open the Insert Fields list.

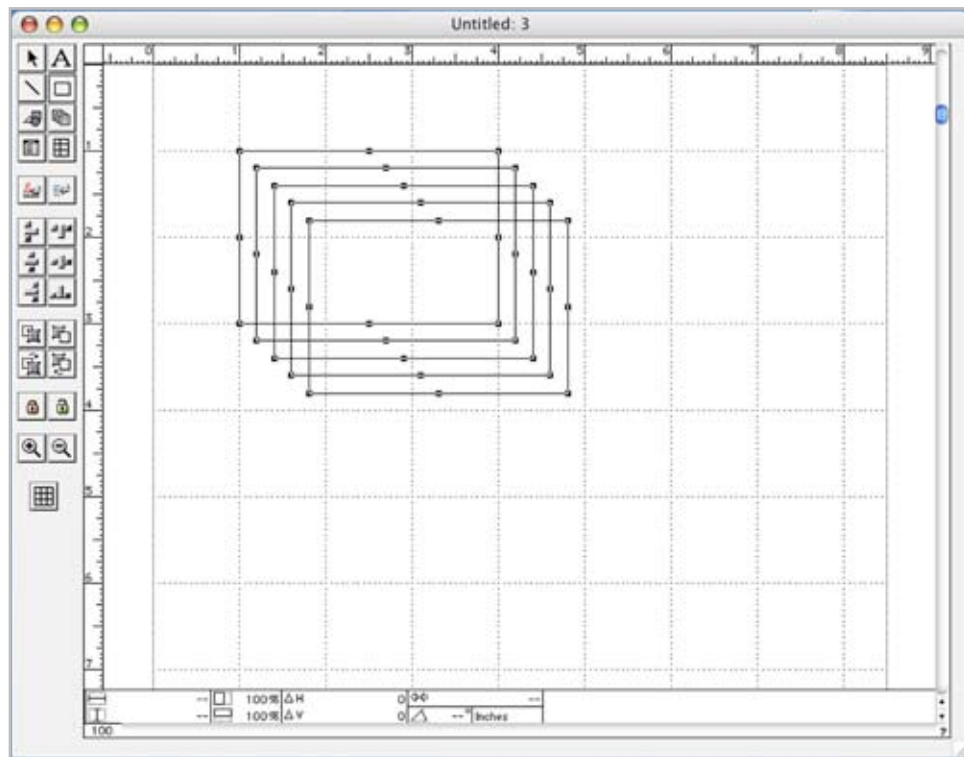
The shortcut noted next to Insert Fields also opens the Insert Fields window. Refer to the Appendix for a list of available shortcuts. Details on the drop down menus are included in [Chapter 6: Drop Down Menus](#).

Designer Advanced Features

Designer provides features that save commonly used objects and defaults that can be used in other reports such as a style sheet for text and a component library.

To reduce the time it takes to create objects and design a report, Designer provides features such as auto duplicate object. This feature enables the user to place the duplicated items precisely to get the effect desired.

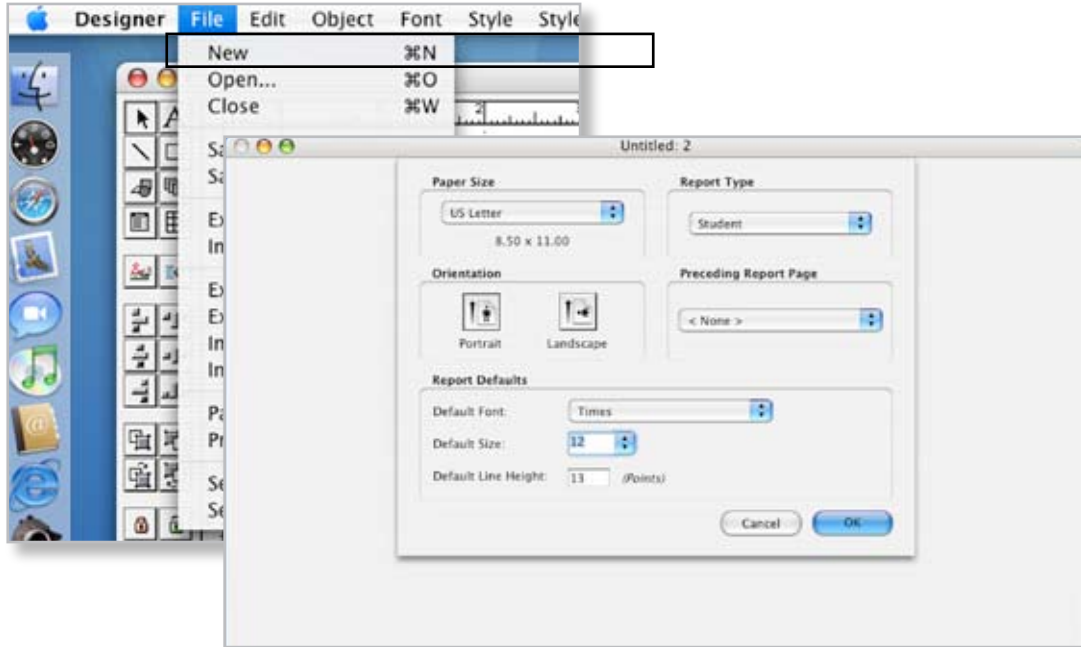
Example 2:



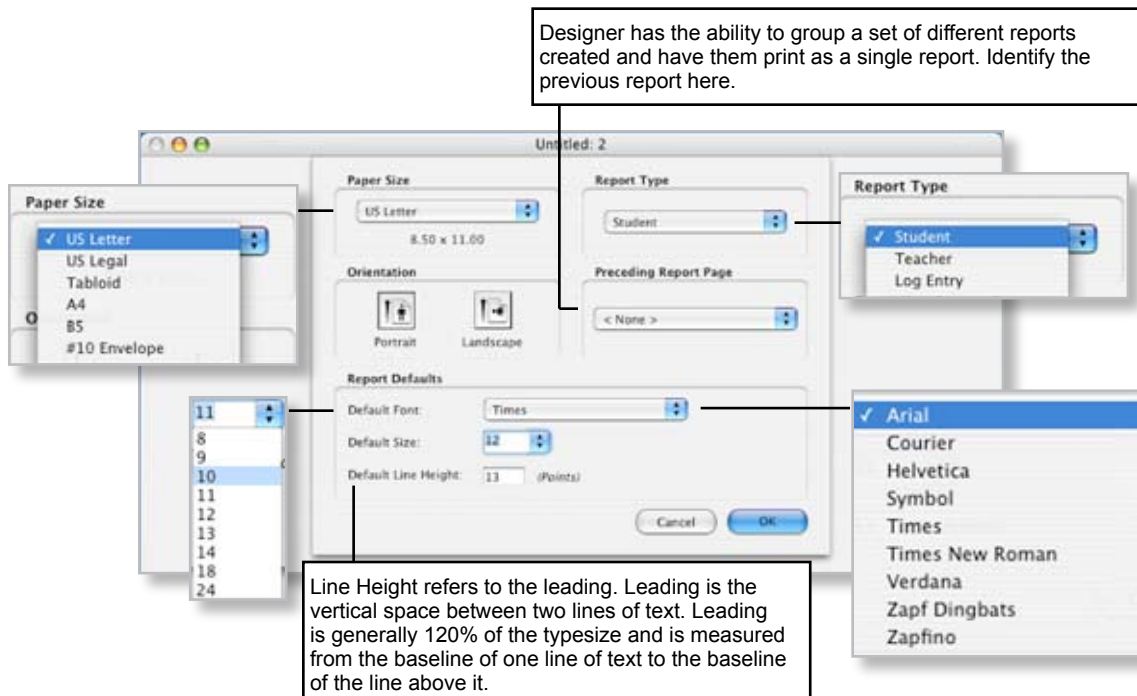
Advanced features of Designer that decrease the time it takes to create your individualized reports and forms are included in [Chapter 11: Make Reports Easier](#).

How to Start

1. Open Designer.
2. Select **File > New**.



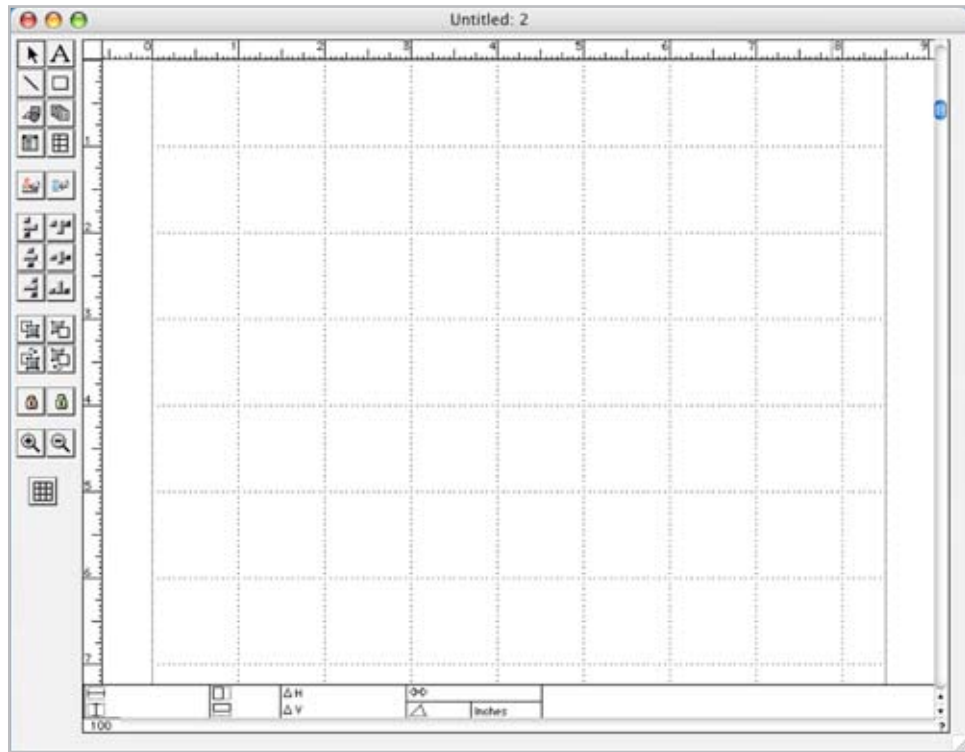
3. The report setup window will display. Select the report parameters.





Chapter 2: Introduction

4. Select **OK**. The Designer Workspace will open.




You are now ready to begin designing your first form.

Layout

You may set up the workspace with grid lines and rulers to assist you in your report creation.

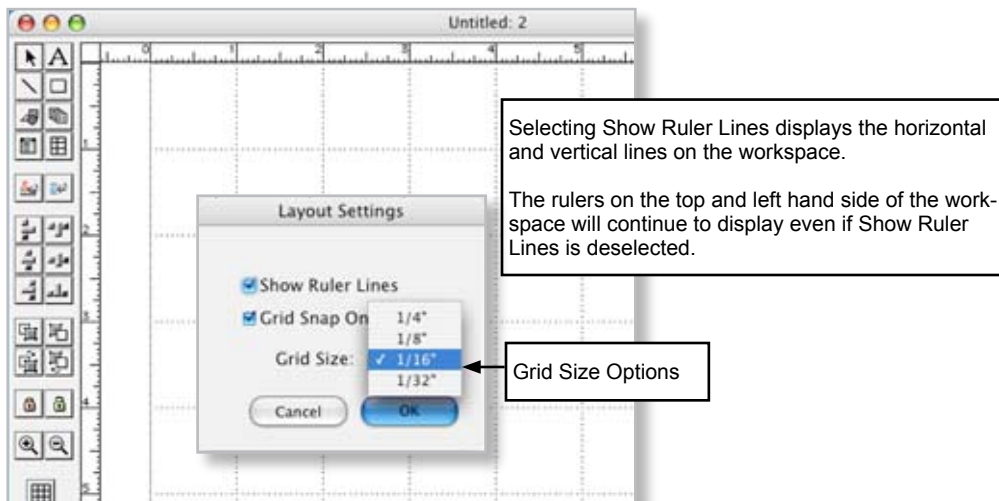
Select Layout Settings

1. Select the Layout Settings Tool  on the toolbar to the left of the workspace.



2. Show Ruler Lines and Grid Snap On are active by default. Select the checkbox next to the feature to deactivate it.

Grid Snap On allows an object or multiple objects to be selected and aligned to the next grid marker assigned in the Grid Size. If Grid Size is set to 1/16" and Align to Grid is selected, the object(s) will align with the next closest 1/16" marker.



3. Select OK once settings are identified.

