



## Report Manager

### Overview

**Country or Region:** USA

**Industry:** Special Education

### Customer Profile

The company provides software solutions in the education field, especially relating to Special Education. More than 1,800 US school districts use their software.

### Business Situation

The company had an existing module for running reports. However, it had several major problems:

- Hard to use
- Lacked key features
- Difficult to export data
- Lack of flexibility

A new reports module was required to address these issues.

### Solution

The company chose Extentia to design and prototype a new, web-based reports module.

*Extentia designs a replacement reports module for a web-based Special Education application, significantly improving usability and adding advanced features.*

## Summary

A US-based company providing Special Education administration software required an easy way for their users to create custom reports.

Although they had an existing report designer, it was difficult to operate and was unpopular with users.

The company chose Extentia to design and prototype a new web-based 'Report Manager' module. The final design met all the customer's requirements, improving usability while adding many powerful new features.

## Situation

The existing reports module suffered from several problems:

- Difficult to use
- Had limited functionality
- Could not handle complex reports (which had to be hand-coded by programmers instead)
- Reports were rendered in HTML (proving difficult to print and export)

Within a relatively short timeframe, the customer wanted to see a prototype of the new module, designed to significantly improve functionality and address these issues.



## Solution

Reviewing & understanding

The first step was for Extentia to look at the existing module to understand the features and functionality.

The next step was to identify typical workflows, and design the new module accordingly.

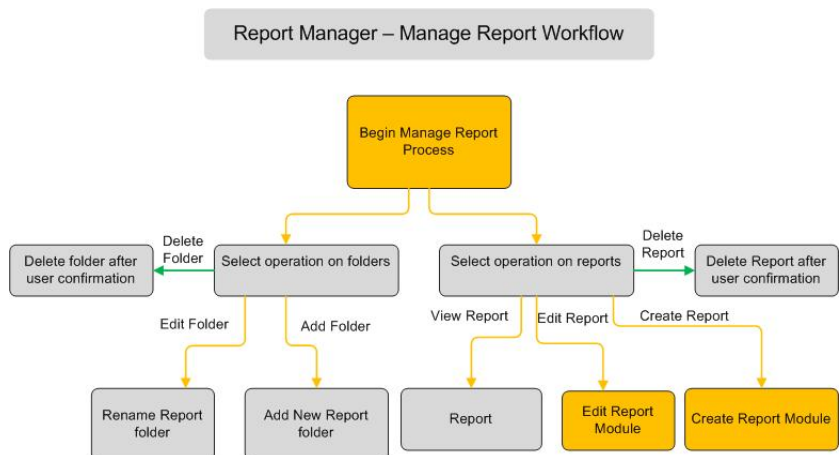
A comprehensive 'Report Manager' was designed, allowing users to locate, select and run existing reports as well as design new reports.

Wizard-based approach

For the report designer, Extentia opted for a user-friendly 'wizard' approach, with a step-based workflow enabling users to define and create custom reports. Basic reports require just 4 steps, while additional steps can be used to apply more advanced features.

Improved workflow, increased functionality

The new Report Manager feature was designed to replace the existing report designer workflow and add significantly improved functionality.



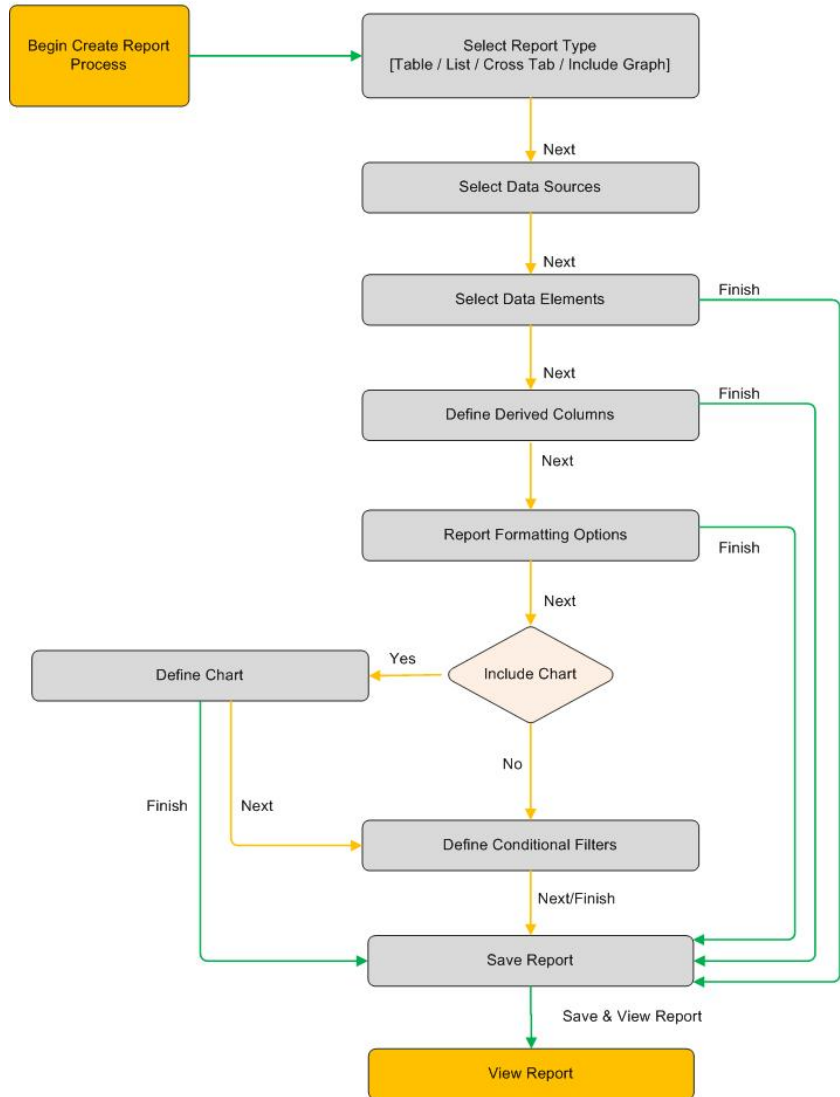


## Technology

Web-based application, using:

- .NET Framework 2.0
- SQL Server 2005
- SQL Reporting Services 2005

## Report Manager – Create Report Workflow





# EXTENTIA

Information Technology

**Report Manager**  
Use the Report Manager to create your own customized reports. You can also view and edit existing reports.

[Manage](#) [Create](#) [Edit](#)

**Step 01: Select Report Type**  
Select the type of report that you want to create, choose whether to include a chart and click Next to proceed.

**Report Type**  
Type Text Here Type Text Here Type Text Here

Table  List  Cross Tab

**Chart**  
To include a chart in the report, check the box.  
 Include a Chart

Status bar: [Next](#)

**01 Select Report Type**  
02 Select Datasources  
03 Select Data Elements  
04 Define Derived Columns  
05 Report Formatting Options  
06 Define Chart  
07 Define Conditional Filters  
08 Save Report

Create Report – Select Report Type

**Report Manager**  
Use the Report Manager to create your own customized reports. You can also view and edit existing reports.

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**Step 06: Define Chart**  
Select options for the chart to be included in the report.

**Chart Type** **Chart Data** **Chart Options**

Select the type and style of the chart.

**Column**  
 Standard  
 Stacked  
 100% Stacked  
**Column-Insert a column chart.**  
Column charts are used to compare values across categories.

**Bar**  
 Standard  
 Stacked  
 100% Stacked  
**Bar-Insert a bar chart.**  
Bar charts are the best chart type for comparing multiple values.

**Line**  
 Standard  
 Smooth  
**Line-Insert a line chart.**  
Line charts are used to display trends over time.

**Pie**  
 Standard  
 Exploded  
**Pie-Insert a pie chart.**  
Pie charts display the contribution of each value to a total.

**Area**  
 Standard  
 Stacked  
 100% Stacked  
**Area-Insert an area chart.**  
Area charts emphasize differences between several sets of data over a period of time.

**Doughnut**  
 Standard  
 Exploded  
**Doughnut-Insert a doughnut chart.**  
Like a pie chart, but can contain multiple series.

[Select Chart Data](#)

Status bar: [Previous](#) [Next](#) [Finish](#)

**01 Select Report Type**  
02 Select Datasources  
03 Select Data Elements  
04 Define Derived Columns  
05 Report Formatting Options  
06 Define Chart  
07 Define Conditional Filters  
08 Save Report

Create Report – Define Chart